Mobile Caregiver+ Provider Portal User Guide

Date: January 19, 2023

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Contents

Getting Started

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General Requirements

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Each vendor must designate at least one Provider Administrator (Provider Admin) during the registration process. Depending on the Payer and the Program, Provider Admins may be responsible for one or more of the following:

- Creating and Managing Mobile Caregiver+ User Accounts.
- Creating and Managing Mobile Caregiver+ Recipient Accounts.
- Task management for billable services.
- Scheduling, monitoring, and management of visits.
- Running reports.

All Users must have registered Mobile Caregiver+ User accounts to log in to the Mobile Caregiver+ Provider Portal.

All Caregiver+ mobile software applications will support the current and two most recent versions of the following software, as long as the developer continues to provide support to ensure that the application meets EVV security requirements:

EVV Hardware and Software Requirements	
Supported PC Operating Systems	• Windows OS (32 or 64 bit).
Supported Mobile Operating Systems	• iOS. • Android.
Supported PC & Mac Browsers	• Microsoft Edge. • Google. • Apple Safari. • Mozilla Firefox.

EVV Hardware and Software Requirements	
Supported Mobile Browsers	• Google Chrome. • Apple Safari .
Mobile Device Requirements	• Form Factor: Tablet or Smart Phone. • Operating System: Android or iOS (see above.) • Bluetooth required: No. • GPS required: Yes. • Voice support required: No. • Min memory of phone: No minimum. • Min storage of phone: 50 MB.

If the Mobile Caregiver+ app is going to work in a mobile device management (MDM) solution, the MDM solution must be configured to allow the next access to the app.

Note: If listed as Optional below, EVV will still be possible. If listed as Required, EVV will not function effectively without the privilege. Cellular data or Wi-Fi data is required, but a user doesn't need both.

MDM Access	Required/Optional	Reason
Camera	Optional	For user to take avatar picture.
Face ID (when available)	Optional	For biometric app login.
Fingerprint ID (when available)	Optional	For biometric app login.
Location Services	Required	For geo-location of visit check-in / check-out.

MDM Access	Required/Optional	Reason
Photo Library	Optional	To allow user to select avatar picture.
Mobile Data	Required (unless user accesses internet only via Wi-Fi network)	For internet access.
Wi-Fi Data	Required (unless user accesses internet only mobile network)	For internet access.
File Storage	Required	For local encrypted storage of working data.

Related Topics

- *Logging In*
- *Provider Portal Overview*
- *Viewing the Main Menu*
- *Changing Refresh Settings*
- *Commonly Used Icons and Controls*
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Logging In

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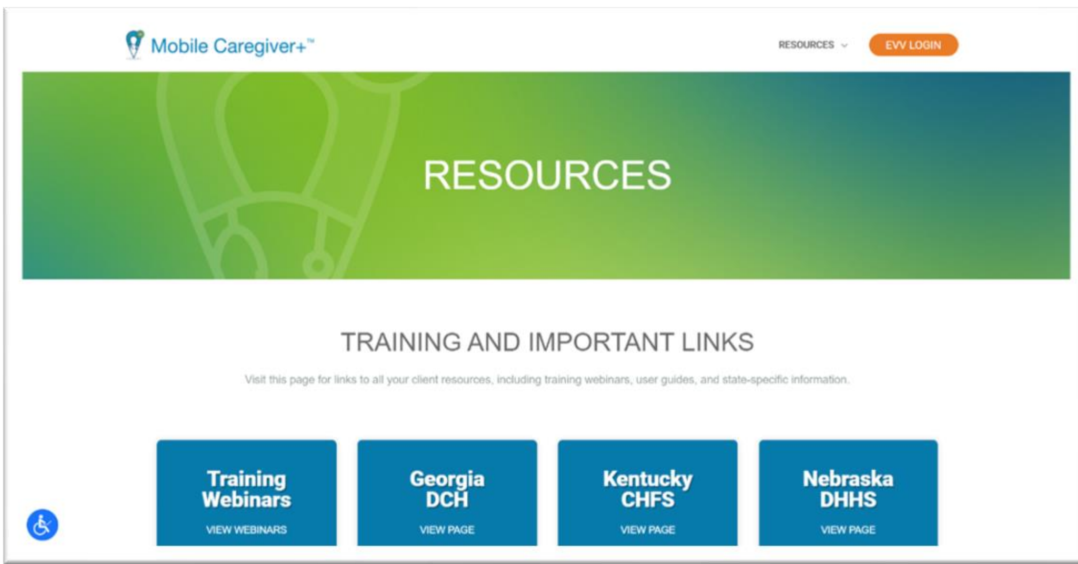
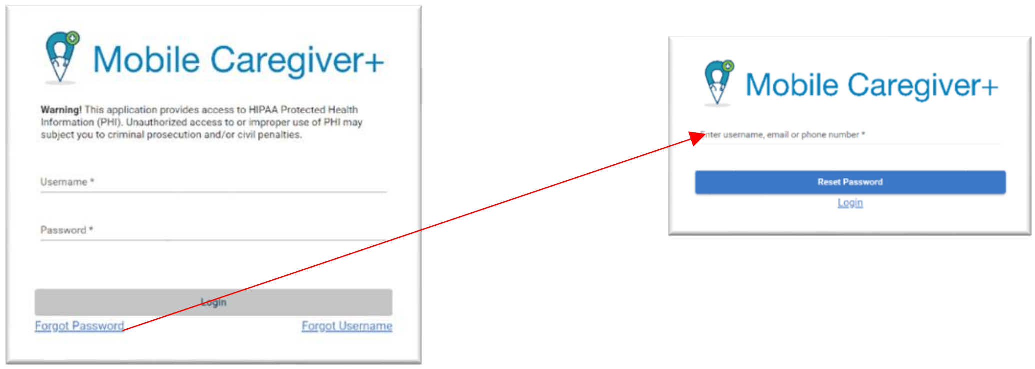
Mobile Caregiver+ Provider Portal is a web-based application.
Open your web browser. The best practice recommendation is for providers to use Google Chrome.

1. Type *mobilecaregiverplus.com* in the address bar of your Internet browser and press the **Enter** key.
2. Click the orange **EVV LOGIN** command located in the upper right corner of the screen.



3. Enter the Email, **Username**, or cell **Phone** number listed in your Mobile Caregiver+ profile.
4. Click Reset Password.



Note: You will either receive an email or at text message with a temporary link that will allow you to log-in and change your password. You must login within 36 hours of resetting your password, otherwise, the temporary password will expire, and you will have to reset your password again.

5. Click the blue **Login** command.
6. Use the temporary password to login; the system will prompt you to create a new password.

   The Mobile Caregiver+ Provider Portal opens in Dashboard view.

   *Note: If you are new to the login and have been assigned the **Provider Administrator** or **Billing** user role, you will receive an email inviting you to join the agency. You will have 36 hours to activate your account; after that time, the invitation expires.*

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Provider Portal Overview: Viewing the Dashboard

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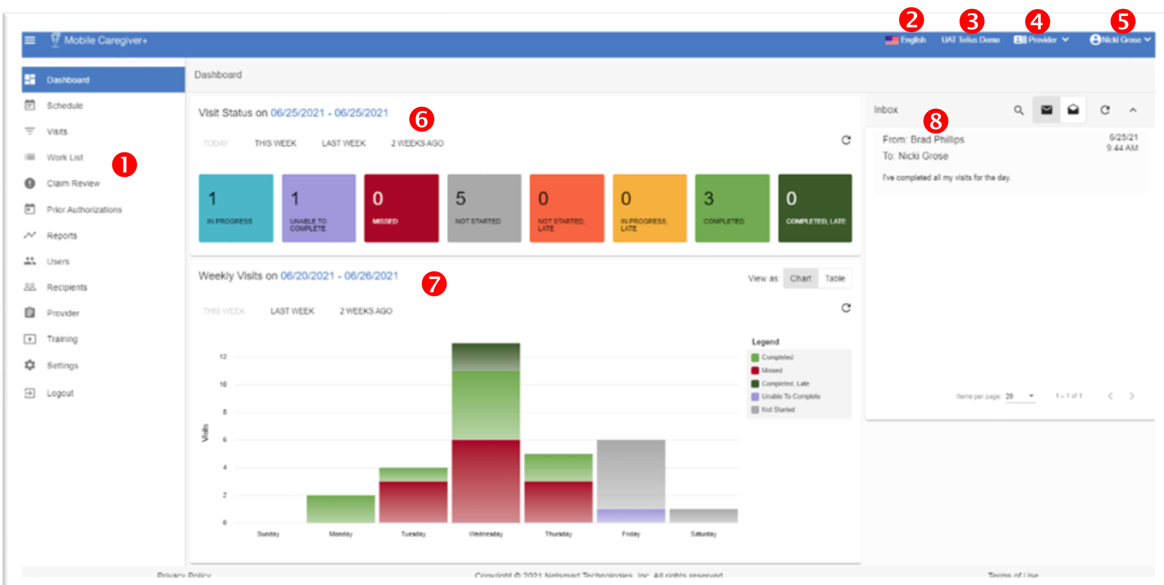
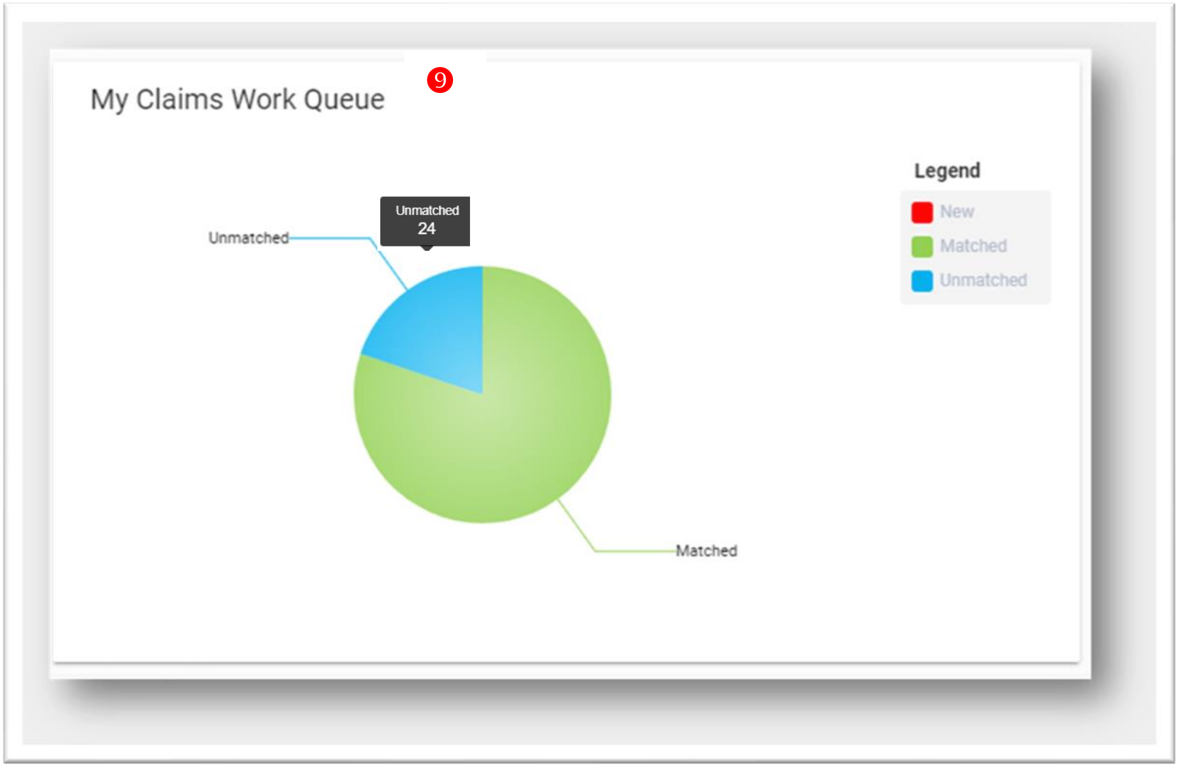
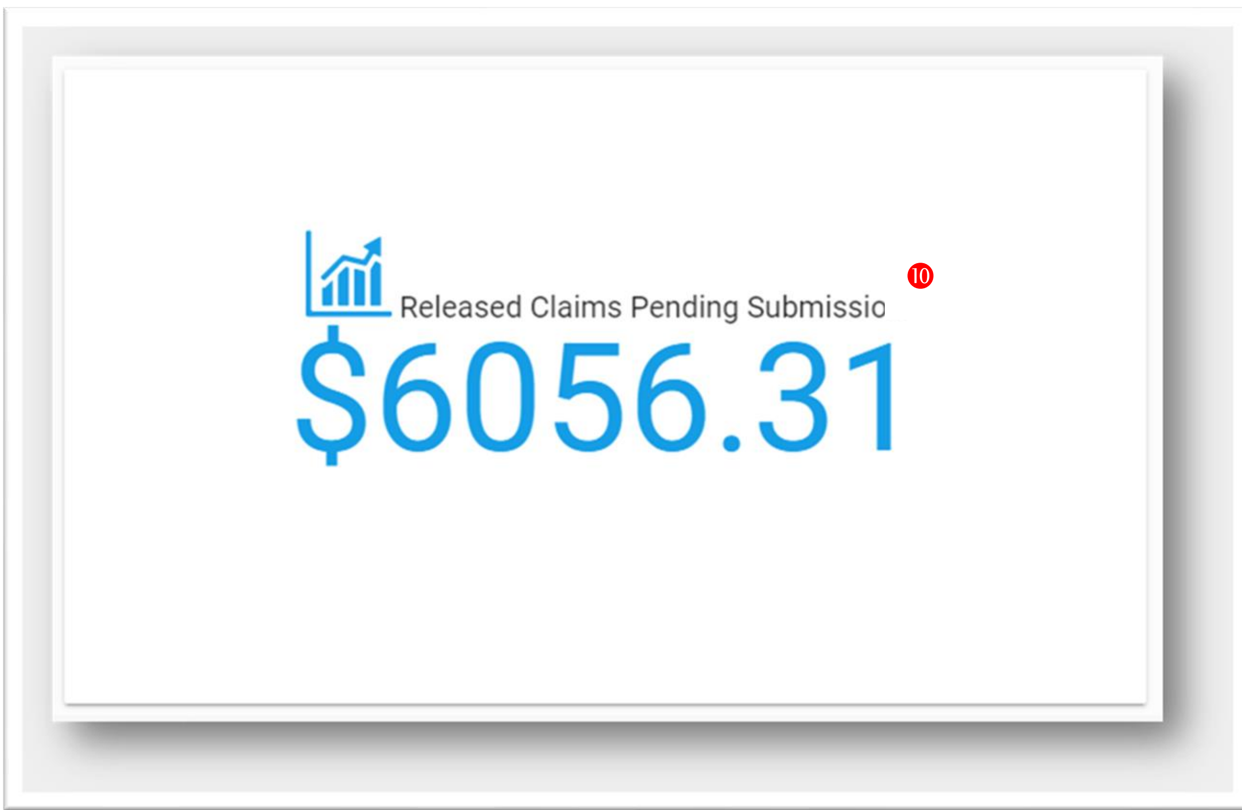
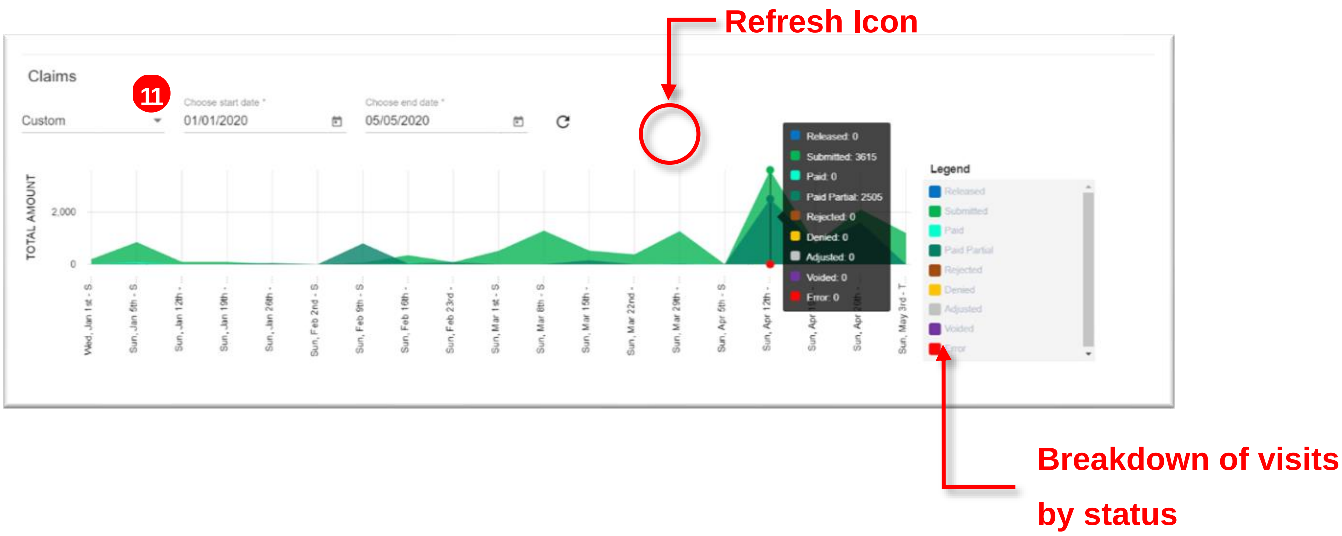
The Mobile Caregiver+ Provider Portal displays an instant overview of near real-time and/or real-time EVV analytics data in the Dashboard; for more information about the data displayed in the Dashboard, see the numbered items described in the table below the screenshots.

More detailed information about how to use each section of the dashboard is included in the Using the Dashboard. The following screenshots represent sections of the dashboard and are displayed in the order in which they appear, from top to bottom.




My Claims Work Queue
9
Legend
New
Matched
Unmatched
Unmatched
24
Unmatched
Matched


10
Released Claims Pending Submissio
$6056.31



Dashboard Item	Description
❶	The **Main Menu button** allows Users to expand and collapse the Main Menu. See Viewing the Main Menu for more information on the menu options.
❷	The **Language** icon allows Users to select the display language for the Provider Portal.
❸	The **Agency Name** displays the name of the active agency/location. Users can click on the current active agency to switch locations.
❹	The **User Role** displays the assigned User Role of the active User; the system will display Caregiver if a Caregiver logs into the Provider Portal.
❺	The **Username** displays the name of the active User. Click on the active User's name to access the **My Profile** option, where Users

Dashboard Item	Description
	can update their Mobile Caregiver+ User profiles or **Log Out** of the Provider Portal.
❻	The **Visit Status** section displays near-to real-time status information for scheduled visits. Users can choose to view status data for scheduled visit for one of five date ranges: **Today**, **This Week**, **Last Week** or **2 Weeks Ago**. The total number of visits for each visit status will be displayed in the respective colored tile**.** The colored tiles contain hyperlinks which provide direct access to the corresponding visits within the **Visits List**. Users can choose between a chart or table display.
❼	The **Weekly Visits** section displays daily EVV visit information for one of three weekly time ranges, **This Week**, **Last Week,** or **2 Weeks Ago.** The colored stack chart contains hyperlinks, which provide direct access to the corresponding visits within the **Visits List**. Users can choose between a chart or table display.
❽	The **Inbox** displays HIPAA compliant messages that are sent to, and notes/alerts that are received from, Caregivers. The Inbox also displays alerts and notifications from Netsmart. Notes/Alerts contain a hyperlink to view visit details. Users cannot respond to messages in the Inbox but can *send messages to Caregivers* from the Users page.
❾	The **My Claims Work Queue** section displays analytic data for completed visit by statuses, New, Matched, and Unmatched. The chart contains hyperlinks which provide direct access to the Work List. Users can choose between a chart or table display.

Dashboard Item	Description
⑩	The **Released Claims Pending Submission** section displays the total estimated payment amount for all unsubmitted billable service records that have been released to Claims Reviews. The display contains a hyperlink which provides direct access to Claims Review.
⑪	The **Claims** section displays status and remittance data for all billable service records that have been Released from the Work List. Providers can configure reporting parameters, including selecting the chart type and date range. Users can choose between a chart or table display. The report contains a hyperlink which provides direct access to Claims Review.

Related Topics

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Viewing the Main Menu

You are here: [Mobile Caregiver+ Provider Portal User Guide]() > [Getting Started]() > Viewing the Main Menu

The **Main Menu** provides access to all the features and functions of the Mobile Caregiver+ Provider Portal.

The Main Menu appears on the left side of the Mobile Caregiver+ Provider Portal; the Main Menu icon appears on the top left corner of the Mobile Caregiver+ Provider Portal, above the Main Menu. Click the Main Menu icon circled below – sometimes called the "hamburger icon" – to expand the Main Menu and see a description of all options. Click it again to collapse the Main Menu so that just the icons are visible.

*Note: The **Claim Review**, **Work List**, and **Prior Authorizations** menu options are used for claim processing and are discussed in the Mobile Caregiver+ Claims User Guide, which is available from the Training menu option.*

Menu Item	Description
Dashboard	Displays real-time and near-real-time overview of EVV data analytics for scheduled visits.

Menu Item	Description
Schedule	Displays a calendar chart, which depicts all scheduled visits in a provider's Mobile Caregiver+ Portal. Providers can customize the calendar, review scheduled visits, and add new visits to the EVV portal. The Schedule menu option allows providers to view existing schedules, check for availability, and add new visits.
Visits	Displays a list chart, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Portal. Providers can use the fields in the header to filter the list and to add new visits to the EVV portal. The Visits menu option allows providers to effectively search for and manage scheduled visits, such as, manually completing missed visits, rescheduling visits, canceling visits, etc.
Work List	Displays a list chart, which depicts records for billable services that have been rendered. Providers will use the Work List to locate, review, process, remediate, and release billable services for claims submission.
Claim Review	Displays a list chart, which depicts status and remittance data for all billable service records that have been released from the Work List. Providers will use the Claims Review menu option to obtain status and remittance data for released service records as well as to adjust, void and add Third Party Liability, Explanation of Benefits (EOB) entries for Paid and Partially Paid claims.
Prior-Authorizations	Displays a list chart, which depicts all Prior Authorizations (PA) which have been added to a Provider's Mobile Caregiver+ Portal. Providers can use the Prior Authorization menu function to locate and review Prior Authorizations in their Provider EVV Portals. Depending on the Payer and Program, some providers may be

Menu Item	Description
	able to add new Prior Authorizations to, and/or edit existing Prior Authorizations in their Provider Portals.
Reports	Displays a list of Provider Reports that are available in the Mobile Caregiver+ Provider Portal. Providers can use the Reports Menu Function to select, configure, run, and export reports from their Mobile Caregiver+ Portals.
Users	Allows Providers to locate, add, edit, and manage Users in their Mobile Caregiver+ Portals. Depending on the Payer and Program. Providers may have full or limited capability to manage User settings/properties in their Provider Portal.
Recipients	Allows Providers to locate, add, edit, and manage Recipients in their Mobile Caregiver+ Portals. Depending on the Payer and Program, providers may have full or limited capability to manage Recipient setting/properties in their Provider Portals.
Providers	Allows Providers to review and to make permissible changes to the configuration settings for their agencies. Depending on the Payers and Programs. Providers may be able to do one or more of the following: Edit their agency's Profiles demographic data. Manage tasks. Edit Contractors' data. Update override rates for billable services. Add and edit a Provider Medicaid ID associated with a specific Payer, Plan, and Program.

Menu Item	Description
Settings	Allows providers to configure the auto refresh timer for the Dashboard, Users, and Schedule screens. Providers can enter the amount of time the system will wait before refreshing and updating data in the Dashboard, Users, and Schedule screens.
Training	Provides access to the Mobile Caregiver+ Training Resources web page. Providers can access online User Guides, Training Videos, sign up for live EVV training Webinars, as well as open online help desk support tickets.
Logout	Allows providers to exit the Mobile Caregiver+ Provider Portal.

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Configuring Auto-Refresh Timers

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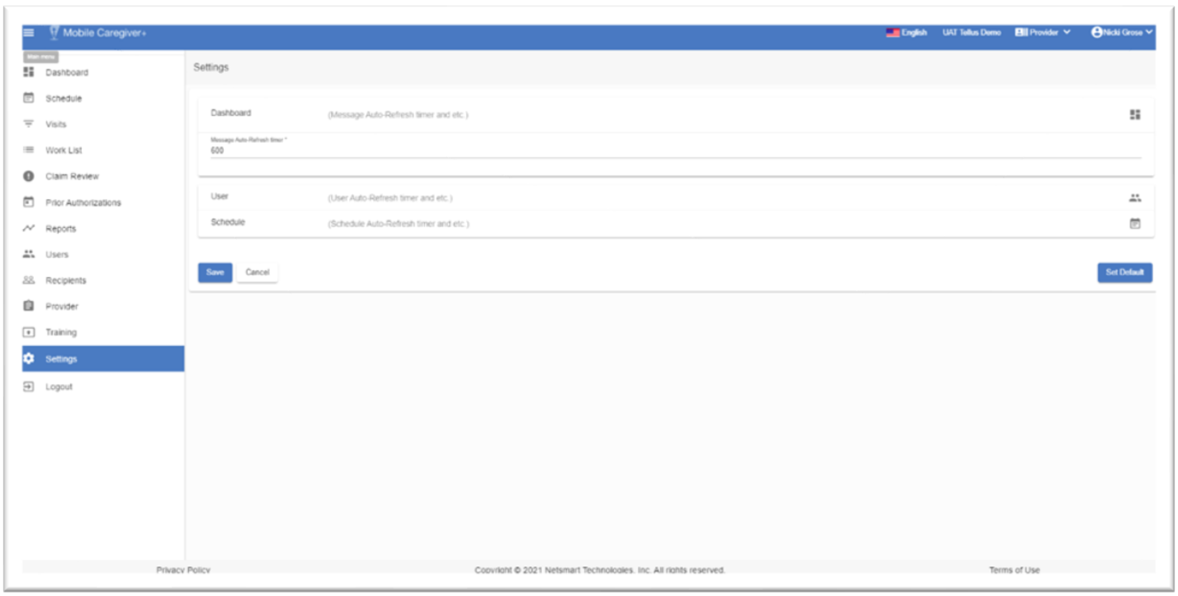
The **Settings** menu option allows Providers to configure the rates, in seconds, for the auto refresh timers for the Dashboard, Users, and Schedule screens. Provider can enter the time, in seconds, that system will wait before updating EVV data on the respective screens.

To configure the auto refresh timers for the Mobile Caregiver+ Provider Portal:

1. From the Main Menu, click **Settings.**
2. Click the name of the screen, **Dashboard**, **User**, or **Schedule**, to set the Auto-Refresh timer for the respective screen.



3. Enter Auto-Refresh rate (the time value will be in Seconds) – The refresh rate time must be set to a minimum of 300 seconds.

   Note: Users can click the blue ***Set Default*** *command to reset the auto refresh timers to the default refresh rate, 600 seconds (10 Minutes) for all three (3) screens.*

4. Click the blue **Save** command.

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Commonly Used Icons and Controls

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Conventional Icons Used in this Document.

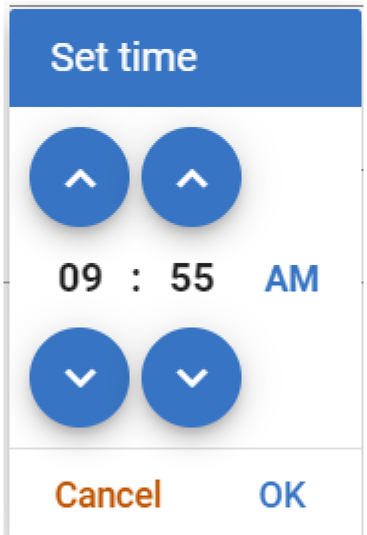
Icon	Description
	Main Menu: Click the Main Menu icon – sometimes called the "hamburger icon" – to expand the menu to see the full list of options; click it again to collapse the menu so that only icons display.
	View Only: Indicates that an object is read-only, Users cannot, or has limited capability to modify object's properties/settings.
	Edit: Indicates an object is editable, Users can modify object's properties/settings.
	Actions: Click the Actions icon to view a list of available submenu options (shortcuts).
	Search: Allows Users to perform Keyword searches. Click on the Search icon to open a search field.
	Reload: Refreshes the active screen/sub-screen with the most current EVV data. Some screens have multiple Reload icons, which are used to refresh individual subsections. Refresh times for the Dashboard, Users, and Schedule can be set using the *Settings* option.
	Clock: Allows Users to enter and/or edit values in time data fields. Click the Clock icon to enter/edit field values. See *Selecting Times using the Clock Icon* for detailed instructions on setting time using this icon.

Configuring Time entries using the Clock Icon

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Getting Started* > Configuring Time entries using the Clock Icon

Fields that require a time entry have a clock icon to the right of them.

1. Click the clock icon, to open the Set time dialog box.



2. Use the up and down arrows to enter/set the time.
3. Click AM or PM to toggle between morning and afternoon.
4. Click ***OK*** to complete the entry and close the Set time dialog box.

Configuring Date entries using the Calendar Icon

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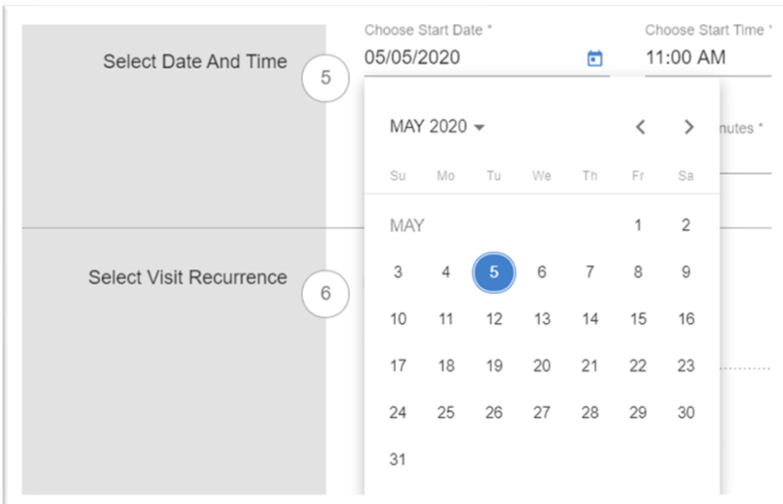
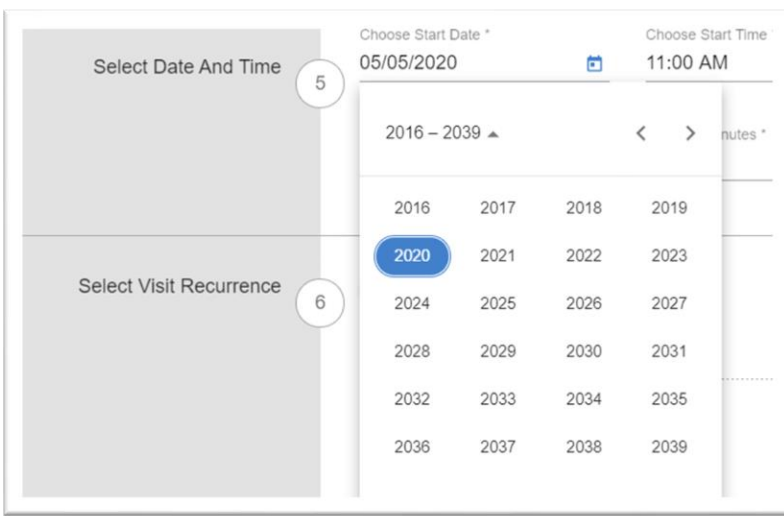
Fields that require a date entry have a calendar icon to the right of them.

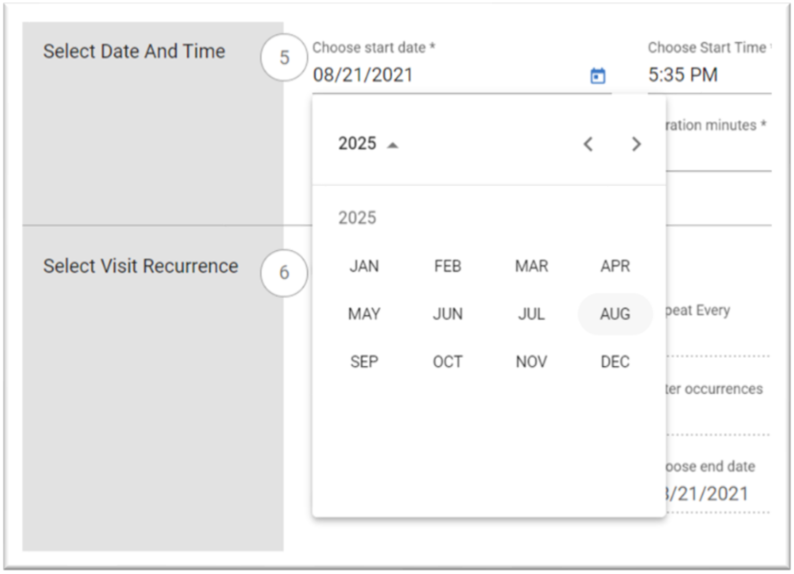
1. Click the calendar icon, to open the edit Calendar dialog box; it defaults to the current year, month, and day.



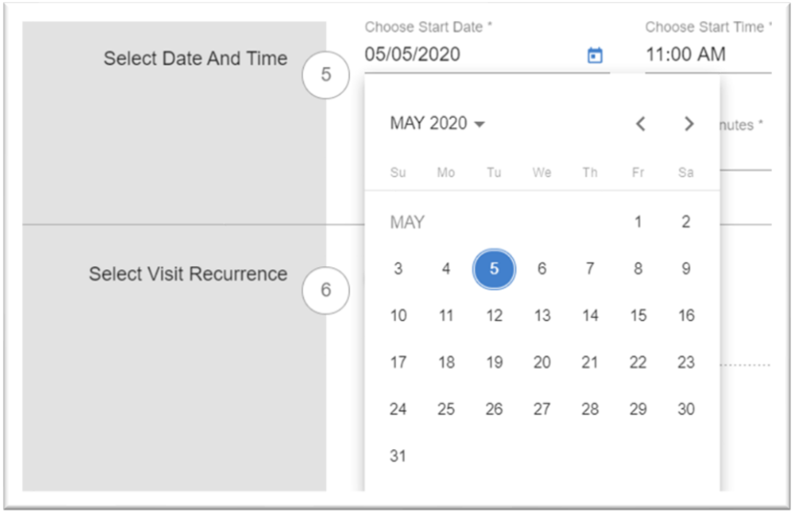
2. To change the year, click the current month and year to display a list of years.



3. Click on the year you want to select. You may have to use the left or right scroll arrows to navigate to the correct year.



4. Click on the month to select it.



5. Click on a date to select it.

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Logging Out

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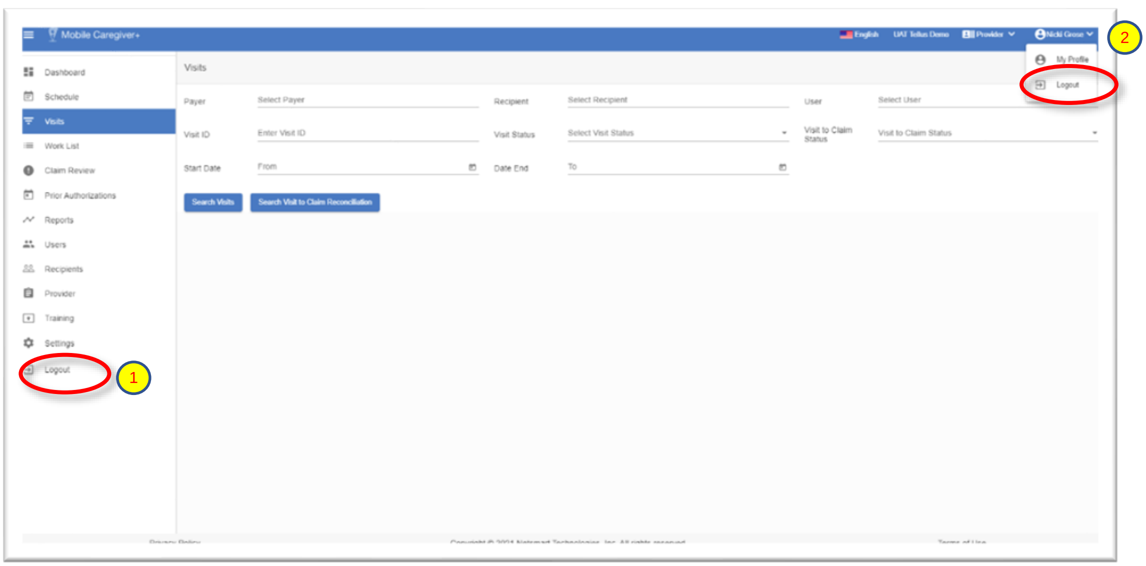
If you are not actively using the system, it is a best practice to log out. Logging out helps to ensure the security and protection of your organization's information, as well as the information for your Recipients and Caregivers. The system will automatically logout the active User after 30 minutes of inactivity.

There are two ways to log out of the Mobile Caregiver+ Provider Portal:

1. From the Main Menu, click **Logout**.

Or

1. Click on your name in the upper right corner of the screen, then click **Logout.**



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Terminology

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The following terms are displayed in the application and are used throughout this User Guide.

- **Administrator (Admin):** A Mobile Caregiver+ User Role that grant a User full access to all available features and functions of the Provider's Mobile Caregiver+ Provider Portal. The Fiscal Agent and Fiscal Intermediary roles also grant Users the same access privileges as an Administrator. Users that are assigned the role of Administrator, Fiscal Agent, or Fiscal Intermediary will have access to data for all recipients in the provider agency. Depending on the Payer and Program, Administrators may have rights to Manage some, or all, object in an agency's EVV portal.

  Note: Multiple User roles can be assigned to a single User account. For example, if a User works in the Office as an Administrator and assist in providing coverage for Caregivers, the User will have to be assigned both the Administrator Role and the Caregiver Role.
- **Billing:** A Mobile Caregiver+ User role that grants a User limited access to the claims processing features and functions of an agency's Mobile Caregiver+ Provider Portal. The Biller Role can be assigned to contractors to allow them to effectively process claims, while limiting access to other confidential data.
- **Caregiver:** A limited Mobile Caregiver+ User Role that allows Users to download, install, and log in to the Mobile Caregiver+ app to complete scheduled visits. The Caregiver User role is usually assigned to the following: Live-in Service Providers, Rendering Providers, Billing Providers, Home Health Aides, Adult Daycare Providers, Providers, Community Mental Health Providers, Agency Providers, PDS Employees, Independent Providers, Service Providers, Participant Directed Service Providers, Personal Care Providers, Group Home Providers, Direct Care Workers, Direct Service Providers, Non-Agency Providers.

- **Healthcare Common Procedure Coding System (HCPCS codes):** A standardized healthcare coding system that is used primarily to identify services provided also known as: Service Description, Billing Codes, Procedure Codes, Revenue Codes. (See also Service Codes). The HCPCS code, also known as the Service or Procedure code, can be made up of a combination of letter and numbers.
- **Service Code:** A code, which can be a combination of letters and numbers, that represents a healthcare service (see also HCPCS codes). Payers assign Service Codes to represent billable healthcare services.
- **Modifier:** (Supplement to the *HCPCS Codes*/*Service Codes*) A two-digit code used to supplement or adjust care description concerning a service or procedure provided by a Caregiver. Modifier can be used by Payers to authorize non-standard services, such as, Telehealth visits or group therapy; not all service codes have modifiers.
- **Agency:** A business which employs one or more individuals to render care also known as***:*** Traditional Home Health Agency, Fiscal Management Agency (FMA), or Fiscal Intermediary.
- **Payer:** Payer refers to the health plan or organization that remits payments to Caregivers/Provider and/or Agencies for the services that are rendered to insured Recipients.
- **Prior Authorization/Service Authorization:** A decision/approval by a health insurer or plan that a health care service is necessary. Health plans authorize care for a Recipient for a specified period, for specified units (billable time increment for a service), or for a specified number of visits.
- **Recipient:** An individual receiving services/care is also known as: Client, Participant, Individual, Family Member (child, parent, spouse, etc.) PDS Employer, Beneficiary, Member, etc.
- **Schedule:** A plan for rendering services, which includes pre-planned visits. Visit can be planned/scheduled by Administrators for Caregivers to provide services to Recipients. In some environments, Caregivers may be responsible for scheduling visits.

- **Visit:** A planed schedule for rendering one or more service(es), which includes planned dates, times, and place for a Caregiver to provide services to a Recipient.

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Acronyms

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Acronym	Definition
EVV	Electronic Visit Verification.
HIPAA	Health Insurance Portability and Accountability Act.
HCPCS	Healthcare Common Procedure Coding System.
LTC	Long-Term Care.
PA	Prior Authorization / Approval.
SA	Service Authorization / Approval.

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Using the Dashboard

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Click a topic below:

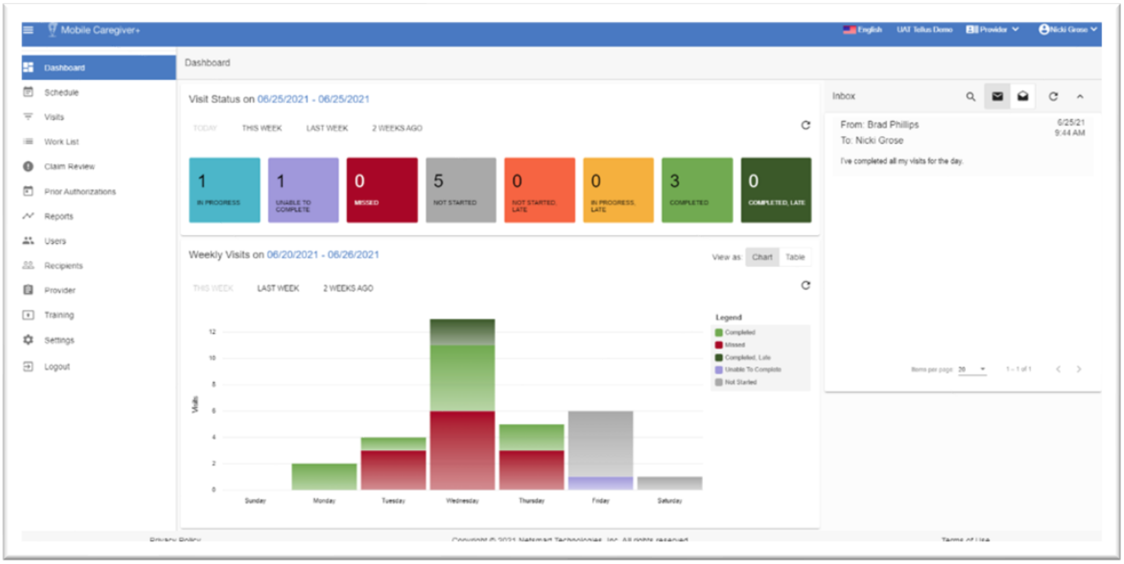
Accessing the Dashboard

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Monitoring Caregivers and Visits* > Provider Portal: Accessing Visit Status Detail

The Dashboard displays various EVV visit and claims analytic data for the active agency. The Dashboard screen is divided horizontal sections. Each section displays EVV analytic data for the active agency.

To access the Dashboard:

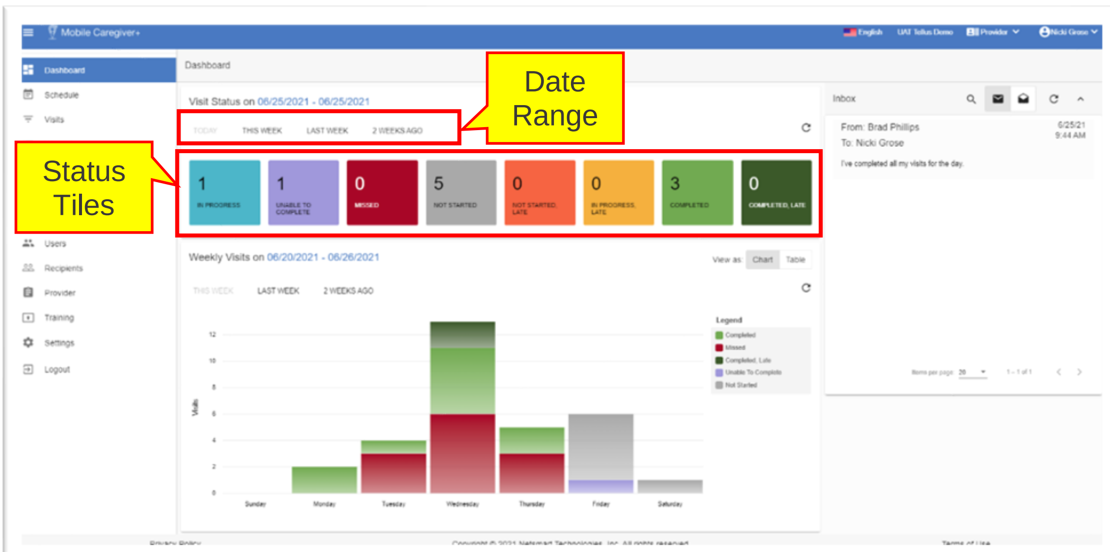
1. From the Main Menu, click the **Dashboard** option.



Reviewing the Visit Status Report

The Visit Status Report displays near real-time-to-real-time overview analytic status data for scheduled visits. There are 8 colored tiles that display summary data for each type of visit status. Providers can select one of four date ranges, ***TODAY***, ***THIS WEEK, LAST WEEK,*** or ***2 WEEKS AGO,*** to view summary status data for all visits scheduled for the selected period. The example below shows visit statuses for visits scheduled for ***Today***.

Visit Status Report

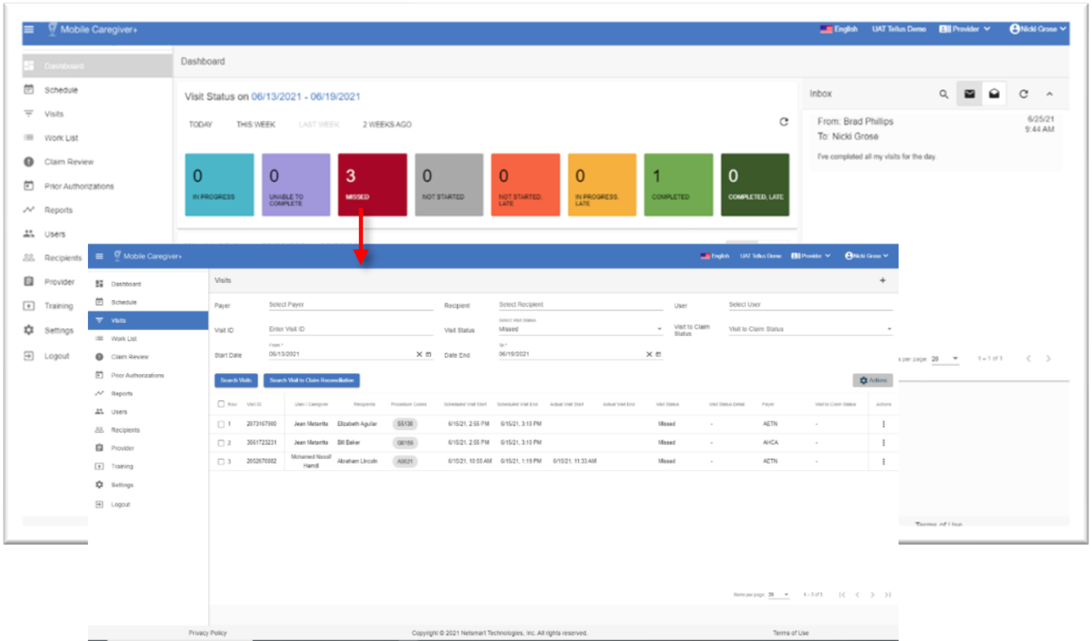


The "reload" icon, ↻, allows Users to refresh the Visit Status chart with current real-time data. The system will display real-time and near real-time status data for scheduled visit.

Status	Description
In Progress	The light blue tile displays the total number of scheduled visits that are actively being completed within the scheduled time, the scheduled end time has not passed.
Unable To Complete	The purple tile displays the total number of scheduled visits that were either canceled or deleted.

Status	Description
Missed	The burgundy tile displays the total number of scheduled visits that were not completed on the Mobile Caregiver+ application; All visit that are completed without using the Mobile Caregiver+ application will be labeled as *Missed* visits i.e., visits where the Caregiver forgot to log in, did not have the device, the device was broken, etc. Provider Admin can manually complete visit that occurred without the use of the Mobile Caregiver+ application.
Not Started	The gray tile displays the total number of visits that are scheduled for future dates, i.e., later in the current day, the next day/week, etc.
Not Started, Late	The orange tile displays the total number of scheduled appointments that have not been started at the scheduled *Start Time****,*** visits that are currently late (that should have already started).
In Progress, Late	The yellow tile displays the total number of scheduled visits that are still being completed (in progress) past the scheduled *End Time****.***
Completed	The light green tile displays the total number of scheduled visits that were completed within the scheduled time.
Completed, Late	The dark green tile displays the total number of scheduled visits that were completed after the scheduled *End Time*.

Users can click on any of the eight (8) colored status tiles to view a list of the corresponding visits in the *Visits* screen. The example below shows a list of **Missed** visits for **Last week**. Users may have to scroll down to see all visits.



Note: See [Viewing Visit Details](#) for more information on the Visits page.

Related topics:

- *[Accessing Weekly Visits Detail](#)*
- *[Viewing Inbox Alerts](#)*
- *[Viewing Claims Information](#)*

Reviewing the Weekly Visits Report

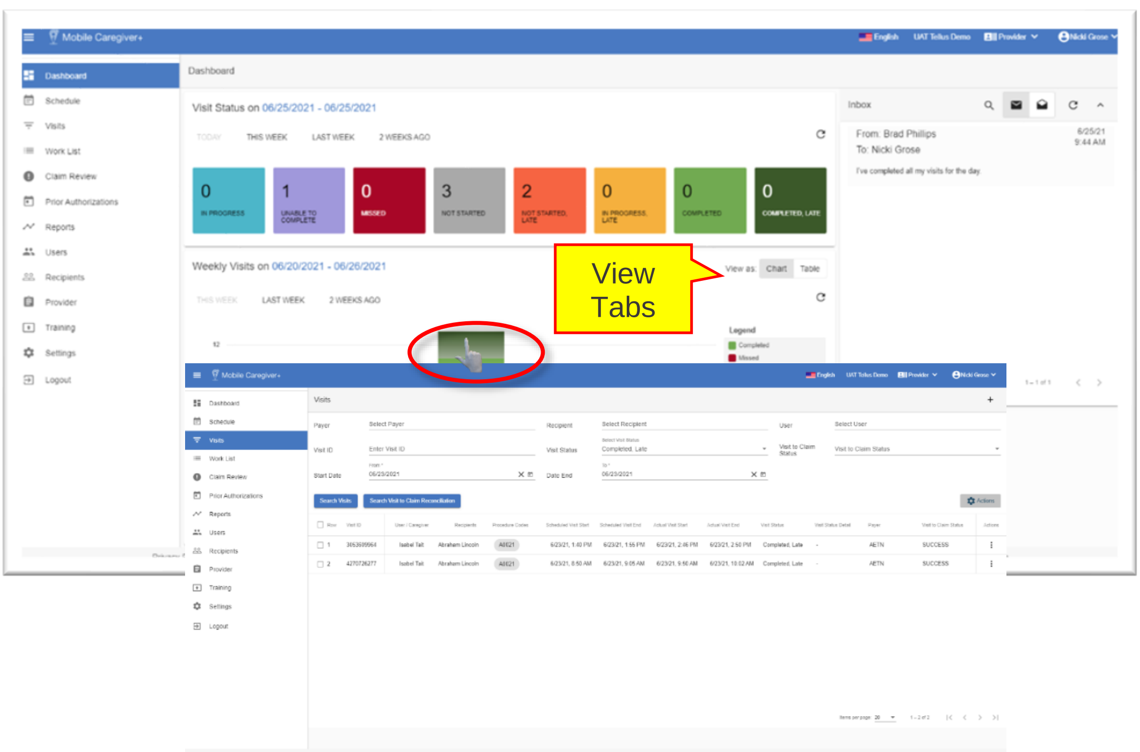
You are here: *[Mobile Caregiver+ Provider Portal User Guide]* > *[Monitoring Caregivers and Visits]* > Provider Portal: Accessing Weekly Visit Detail

The weekly visit report displays daily analytic data for weekly time periods, i.e., ***THIS WEEK, LAST WEEK, 2 WEEKS AGO.*** Users can use the **View** tab to select a Chart or Table display for the report.

The Chart report depicts a stack chart with colored stacks representing the total number of daily visits based on the visit status.

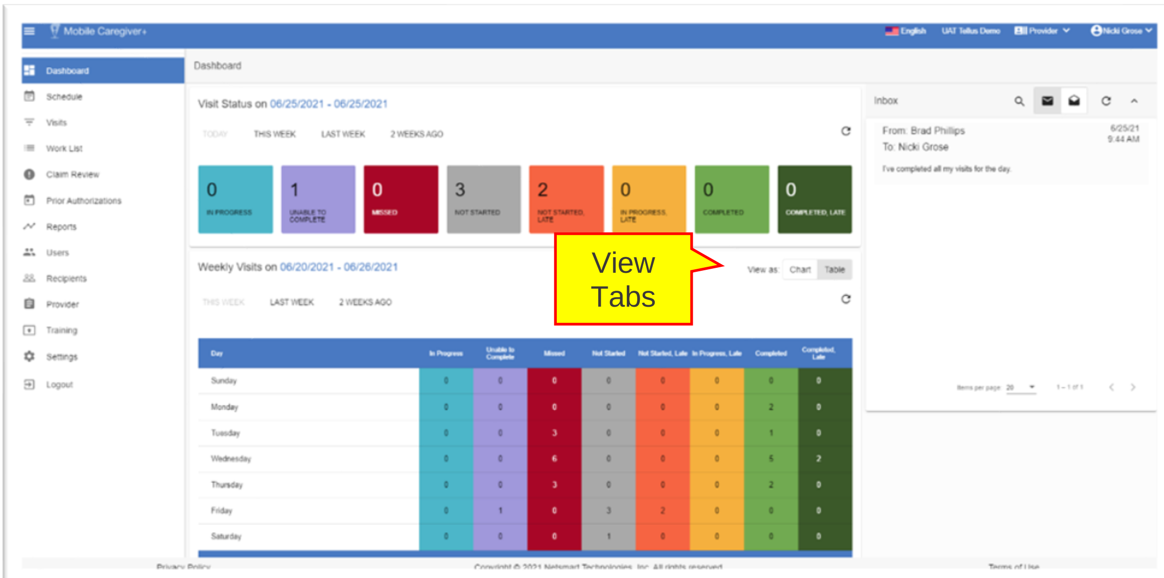
Users can click on a colored stack to view the list of the corresponding visits in the Visits screen. The example below shows the list of corresponding ***Not Started, Late*** visits for Thursday of ***THIS WEEK*** that will be displayed in the *Visits* screen. Users may have to scroll down to view all visits in the Visits list.

Weekly Visits Chart Report



The Table report depicts a list chart which displays the total number of visits by status for each day of the selected week.

Weekly Visits Table Report



Note: See [Viewing Visit Details]() for more information on the Visits detail screen.

Related topics:

- *[Accessing Visit Status Detail]()*
- *[Viewing Inbox Alerts]()*
- *[Viewing Claims Information]()*

Reviewing the Inbox

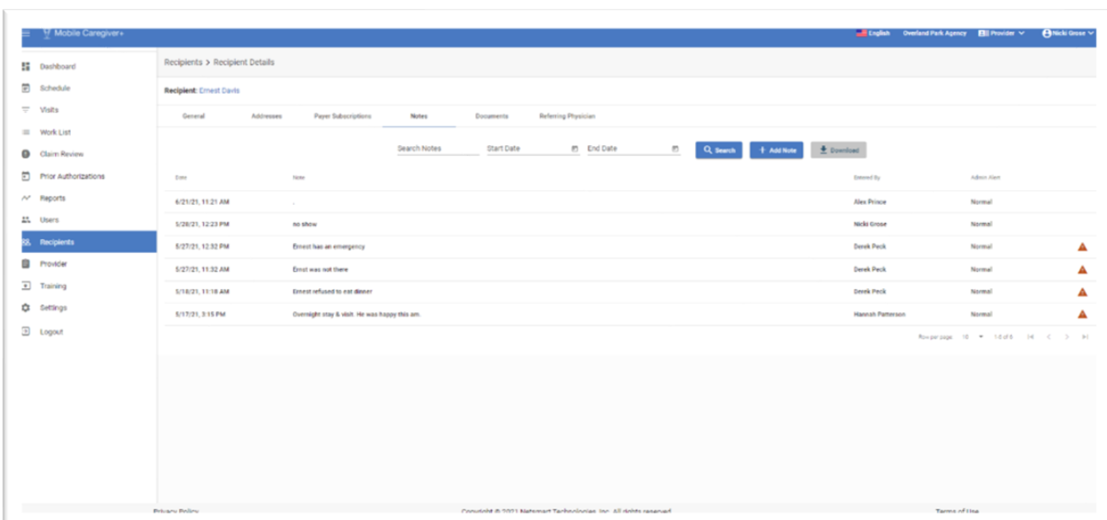
You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Monitoring Caregivers and Visits* > Provider Portal Dashboard: Viewing Inbox Alerts

The Inbox displays the following HIPAA compliant data:

- Text messages that Administrator(s) have sent to Caregivers.
- Recipient notes/alerts that Caregivers have sent to the Provider Admin.
- Notifications and Alerts sent from Netsmart.

When Caregivers enter notes in scheduled visit and check-off the **Alert My Administrator** option, the note will appear the Inbox on the Provider Portal. Administrators can click a note to read the full text.

Inbox

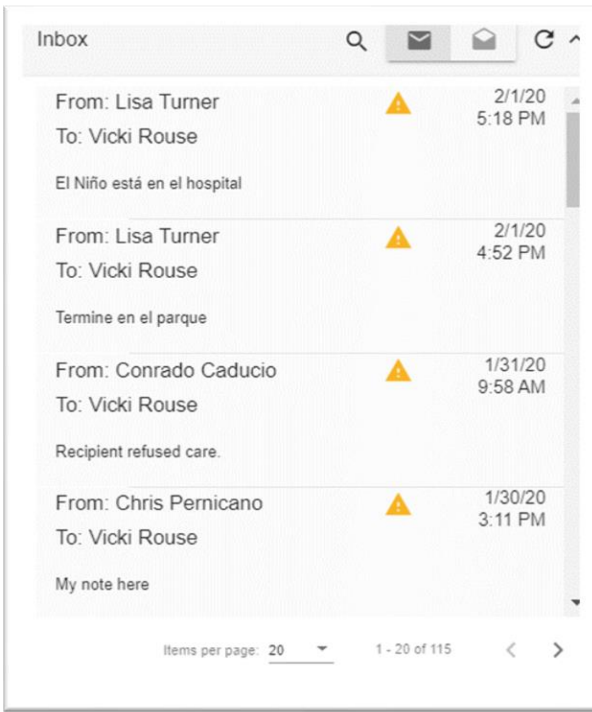


Data displayed on the **Dashboard,** including the **Inbox,** automatically refreshes every 600 seconds by default. Users can change how frequently the **Inbox** refreshes by using the ***Settings*** menu option to configure the Message Auto-Refresh Timer. Users can manually refresh the **Inbox** data at any time by simply clicking the refresh icon, .

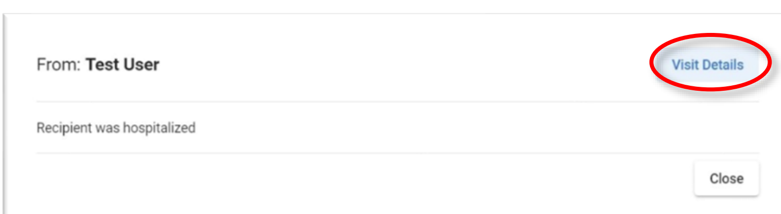
Users can configure the following Inbox settings:

- Filter to display only unread messages, the default view, by clicking the closed envelope icon, .

- Filter to display only opened messages, by clicking the open envelope icon, .
- Search for messages by clicking the magnifying glass icon, .
- Change the number of messages per page, by clicking the **Items per page** drop-down list box. Users can scroll through pages by clicking the forwards arrow or the backwards arrow.

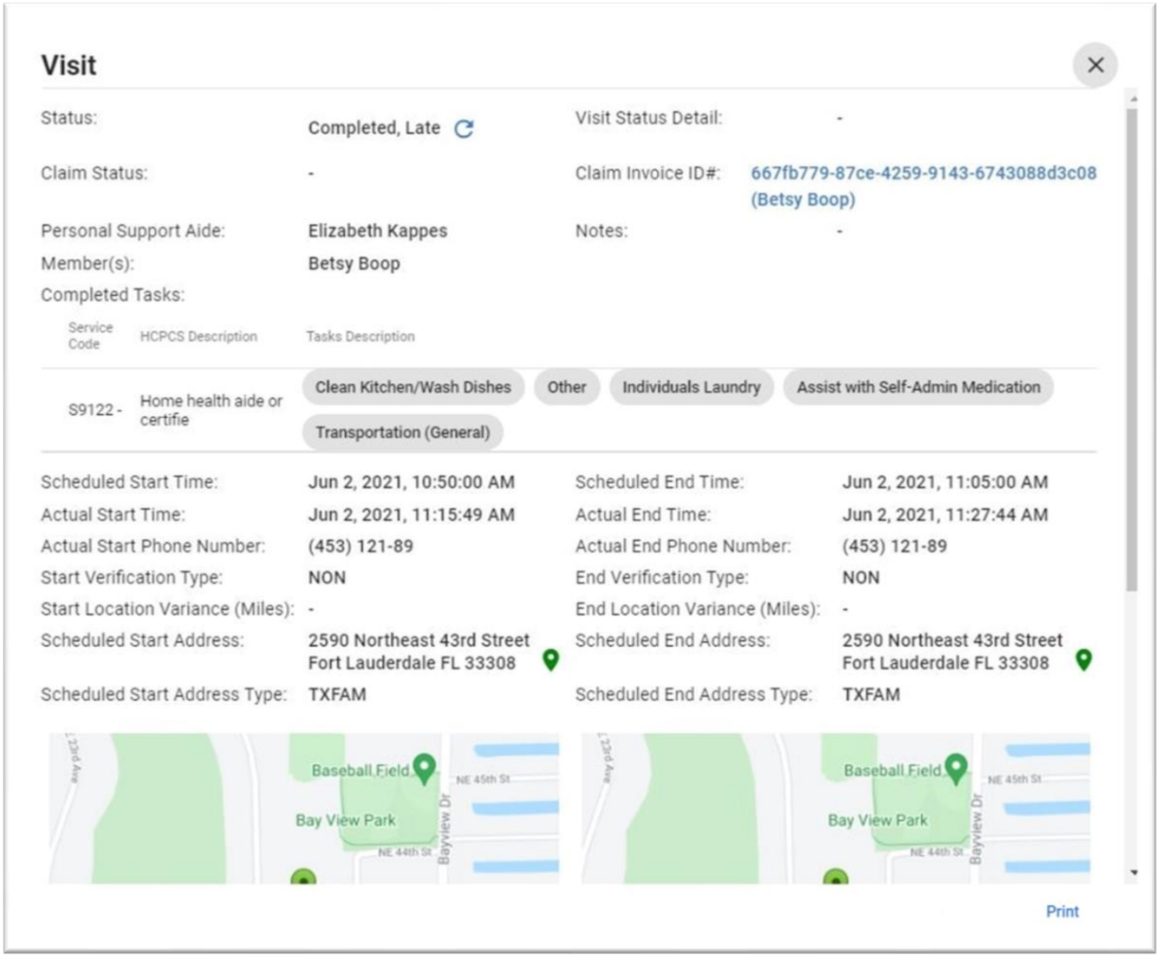


Note: A yellow triangle with an exclamation mark, , indicates that the corresponding message is a note, an alert, that was sent by a Caregiver. Click a message to open it.



Read the message and then click ***Close*** to return to the message list or click *Visit Details* to display the Visit Details screen shown below.

Visit Details



Visit

Status:	Completed, Late	Visit Status Detail:	-
Claim Status:	-	Claim Invoice ID#:	667fb779-87ce-4259-9143-6743088d3c08 (Betsy Boop)
Personal Support Aide:	Elizabeth Kappes	Notes:	-
Member(s):	Betsy Boop		
Completed Tasks:			

Service Code	HCPCS Description	Tasks Description
S9122 -	Home health aide or certifie	Clean Kitchen/Wash Dishes; Other; Individuals Laundry; Assist with Self-Admin Medication; Transportation (General)

Scheduled Start Time:	Jun 2, 2021, 10:50:00 AM	Scheduled End Time:	Jun 2, 2021, 11:05:00 AM
Actual Start Time:	Jun 2, 2021, 11:15:49 AM	Actual End Time:	Jun 2, 2021, 11:27:44 AM
Actual Start Phone Number:	(453) 121-89	Actual End Phone Number:	(453) 121-89
Start Verification Type:	NON	End Verification Type:	NON
Start Location Variance (Miles):	-	End Location Variance (Miles):	-
Scheduled Start Address:	2590 Northeast 43rd Street Fort Lauderdale FL 33308	Scheduled End Address:	2590 Northeast 43rd Street Fort Lauderdale FL 33308
Scheduled Start Address Type:	TXFAM	Scheduled End Address Type:	TXFAM

Print

The Visit Details form displays scheduling details for all scheduled visits; the form also displays actual visit data for completed visits.

Related topics:

- *Accessing Visit Status Detail*
- *Accessing Weekly Visits Detail*
- *Viewing Claims Information*

Reviewing the My Claims Work Queue Report

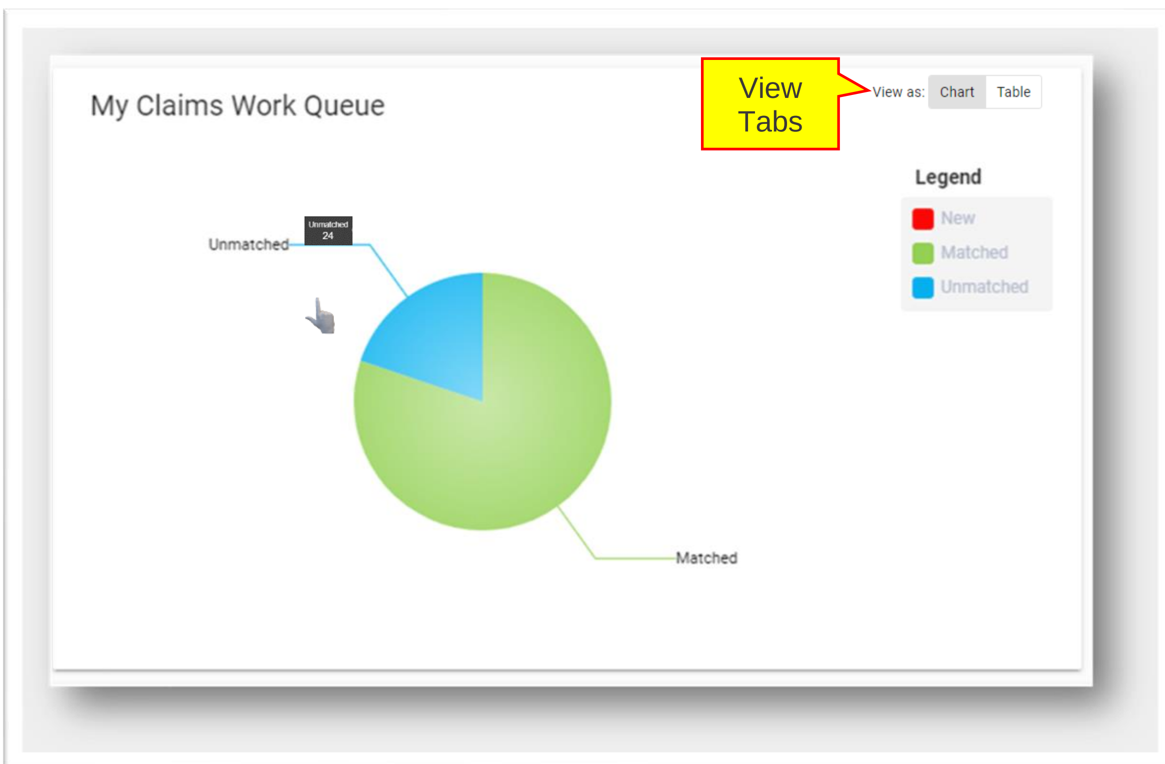
You are here: Mobile Caregiver+ Provider Portal *User Guide* > *Monitoring Caregivers and Visits* > Provider Portal: Viewing My Claims Work Queue

This feature is only available for Providers that have Mobile Caregiver+ Claim's subscriptions.

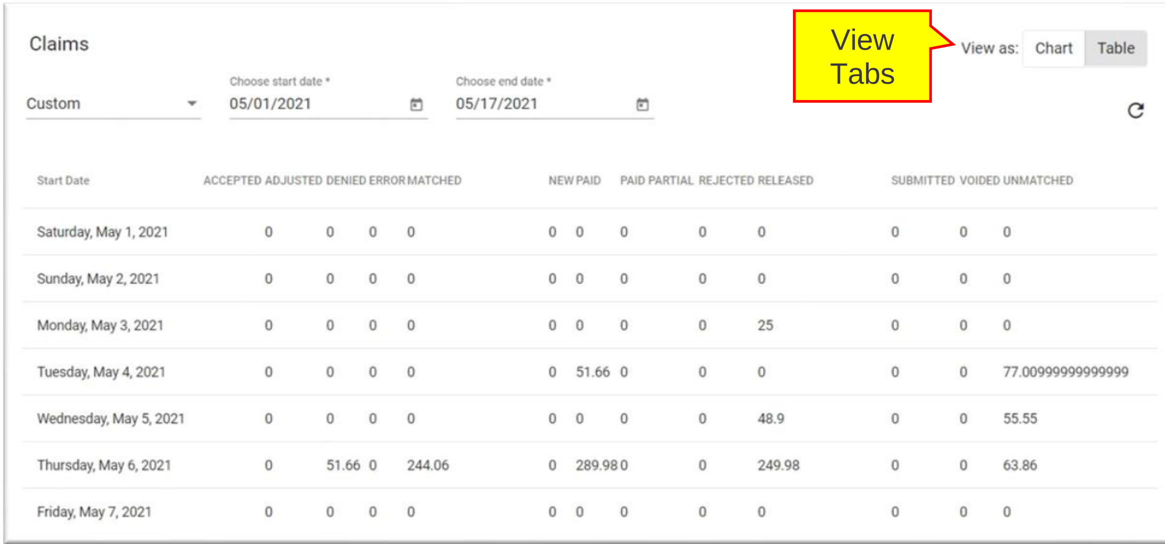
The My Claims Work Queue report displays screening and pre-adjudication results for billable service records in the Work List. Users can configure the system to display a Pie Chart or a Table of New, Matched, and Unmatched service records in the Work List.

- Hover the cursor over any section of the pie chart to see the actual number of claims represented by a slice.
- Click the Chart/Table to view the corresponding list of billable service records in the Work List.

My Claims Work Queue Chart Report



My Claims Work Queue Table Report



Start Date	ACCEPTED	ADJUSTED	DENIED	ERROR	MATCHED	NEW	PAID	PAID PARTIAL	REJECTED	RELEASED	SUBMITTED	VOIDED	UNMATCHED
Saturday, May 1, 2021	0	0	0	0		0	0	0	0	0	0	0	0
Sunday, May 2, 2021	0	0	0	0		0	0	0	0	0	0	0	0
Monday, May 3, 2021	0	0	0	0		0	0	0	0	25	0	0	0
Tuesday, May 4, 2021	0	0	0	0		0	51.66	0	0	0	0	0	77.00999999999999
Wednesday, May 5, 2021	0	0	0	0		0	0	0	0	48.9	0	0	55.55
Thursday, May 6, 2021	0	51.66	0	244.06		0	289.98	0	0	249.98	0	0	63.86
Friday, May 7, 2021	0	0	0	0		0	0	0	0	0	0	0	0

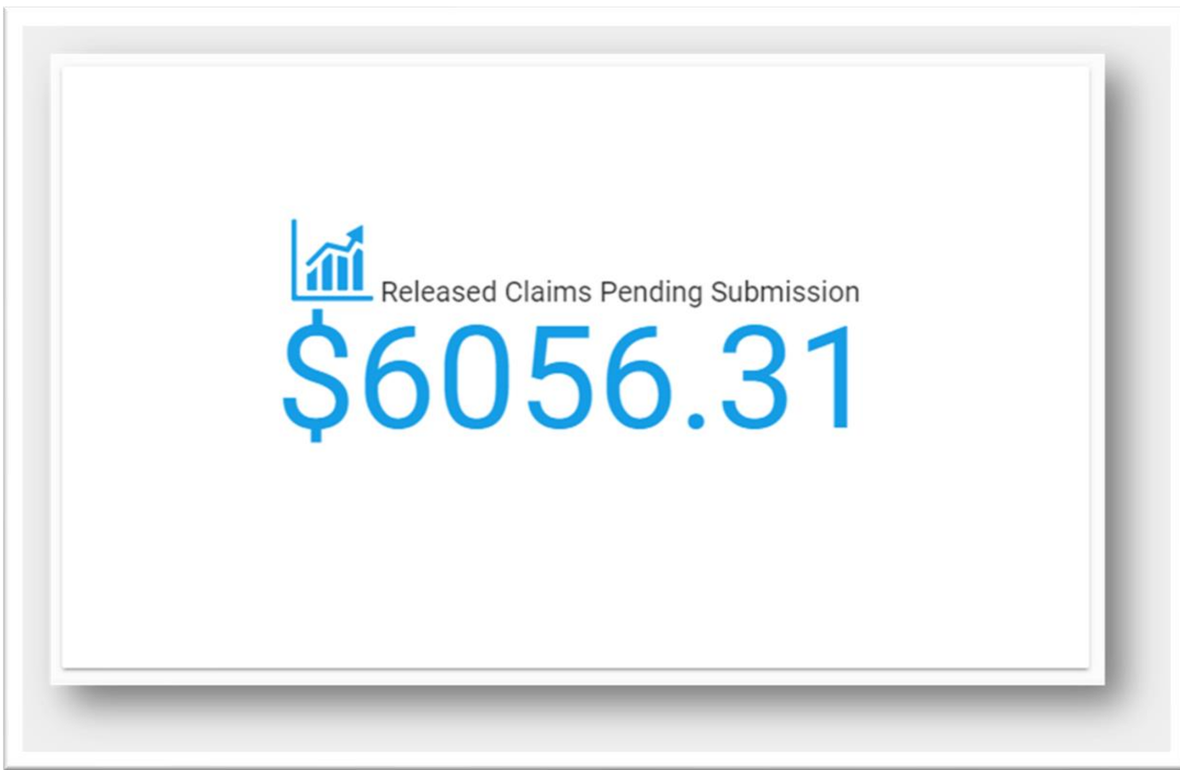
Reviewing the Released Claims Pending Submission Report

This feature is only available for Providers that have Mobile Caregiver+ Claim subscriptions.

The Release Claims Pending Submission Report displays the grand-total estimated payment amount for Matched service records that have been released for claim submission.

Click on the total estimated payment amount displayed to view the corresponding list of released claims in the Claim Review screen**.**

Released Claims Pending Submission Report



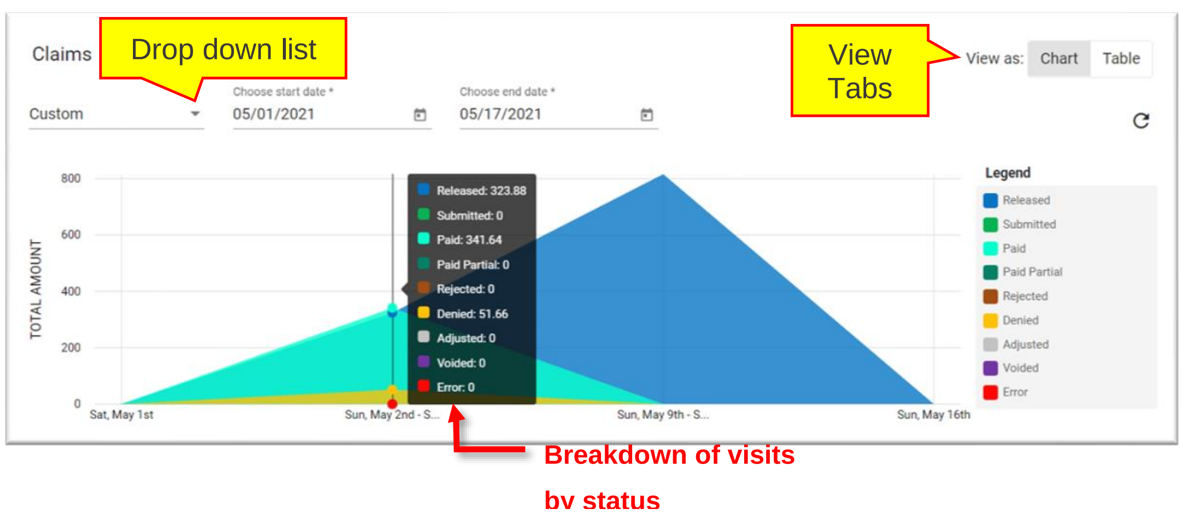
Reviewing the Claims Report

This feature is only available for Providers that have Mobile Caregiver+ Claim's subscriptions.

The Claims section of the Dashboard displays status and remittance data for all billable services that have been released from the Work List**.** Users can configure the system to display a Pie Chart or a Table depicting all billable service records that have been released from the Work List i.e., Released, Submitted, Accepted, Rejected, Paid, Partially Paid, and Denied claims.

- Use the dropdown list arrow, located in the top left corner of the Claims section, to select a time range for the report, i.e., **Today**, **This week**, **Last week**, **This month**, **Last month,** or **Custom**. Users can select **Custom**, which will allow Users to configure custom start and end dates for the report; use the dropdown list to select a date range, and then click the refresh icon at right.
- Hover the cursor over any data point on the report to view a list of visits by status.

Claims Chart Report



Related topics:

- *Accessing Visit Status Detail*
- *Accessing Weekly Visits Detail*
- *Viewing Inbox Alerts*

Scheduling

You are here: *Mobile Caregiver+ Provider Portal User Guide* > Scheduling Visits

Click a topic below:

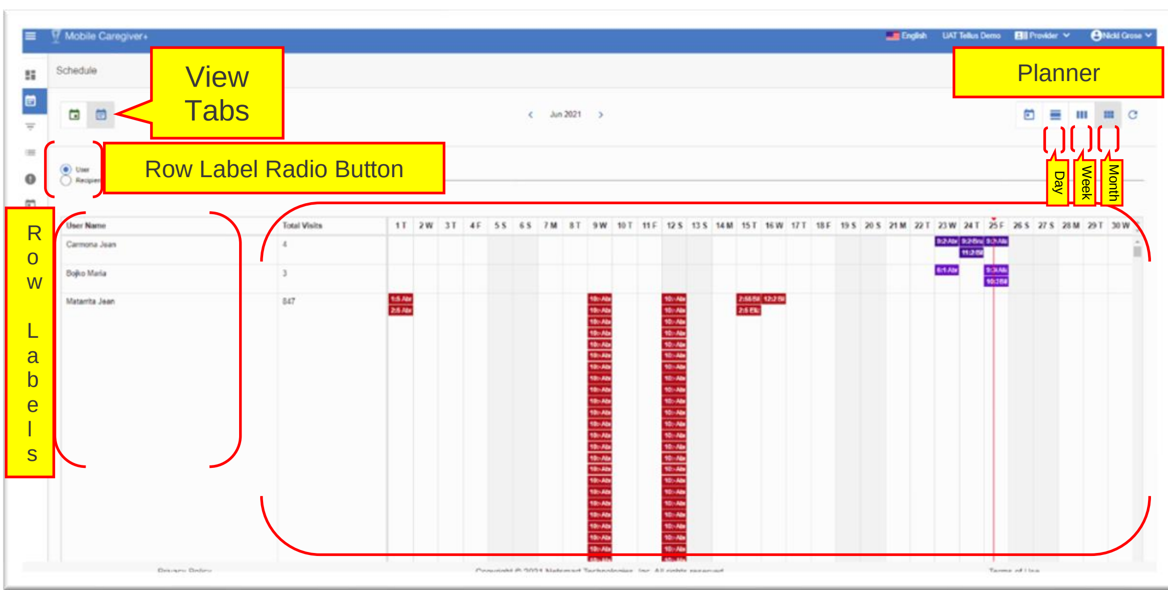
Viewing the Schedule Calendar

You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Scheduling* > Viewing the Schedule

The Schedule Calendar displays a calendar chart, which depicts all scheduled visits in an agency's Provider Portal. The Schedule menu option allows providers to view existing scheduled visits, check for availability, and to add new visits to their EVV Portal by clicking on the **Add New Visit** command, +, located in the top-right corner of the screen.

To view the Schedule calendar:

1. From the Main Menu, click the **Schedule** option**.**
   By default, the system will display a daily calendar depicting scheduled visits for the current day; Users can choose either a Day planner, a Week planner, or a Month planner for the calendar.

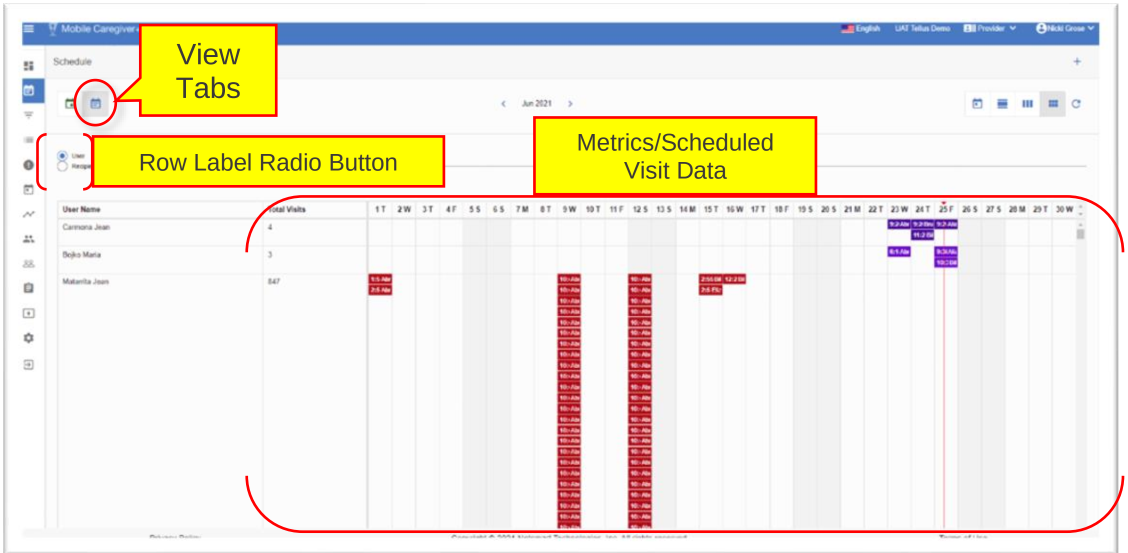


There are two views for the Schedule: *Schedule View* and *Calendar View*. Each is described in the sections that follow. Navigation is similar for both and is described in *General Navigation for Scheduler or Calendar View*.

Schedule View

You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Scheduling* > *Viewing the Schedule* > Schedule View:

Users can configure the Schedule to be displayed in Schedule View, which depicts a bar chart of all scheduled visits in an agency's Mobile Caregiver+ Provider Portal. Users can switch to Schedule View by clicking the blue calendar icon in the upper left corner of the Schedule Calendar screen.



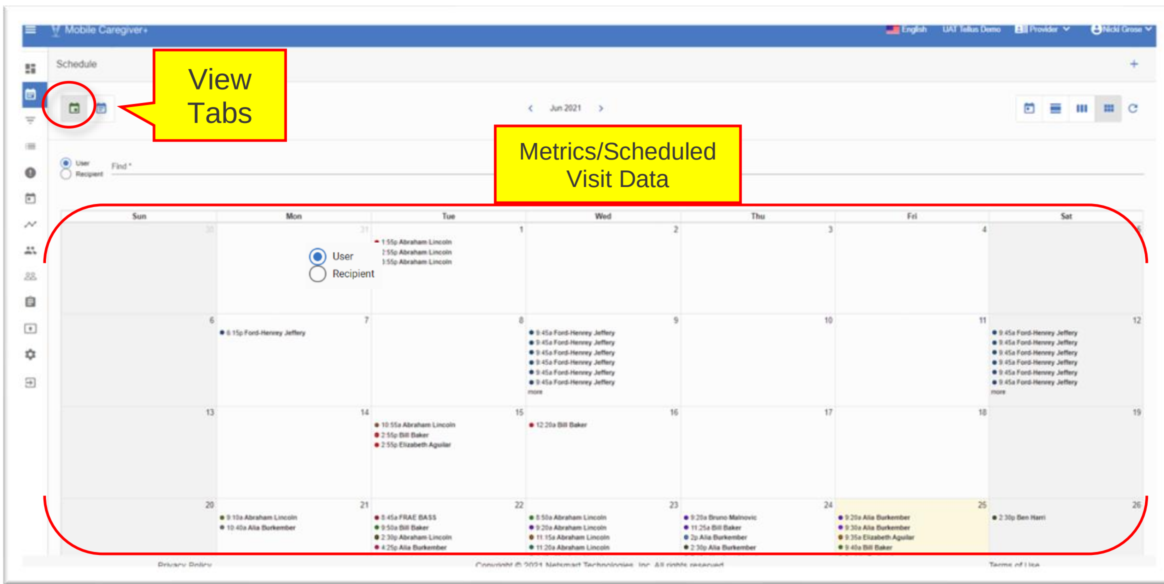
The Scheduler view chart displays the following:

- **Row Label Radio Button**: Allows Users to toggle the dimensions of the row labels between User and Caregiver. If **User** is selected as the row label, the system will display the name of scheduled Caregiver in the Name column; if **Recipient** is selected the Recipient names will be displayed as the row labels.
- **Find**: This a search/filter field; Users can search for and select one or more filter parameter(s) – Use the **Find** field to filter the Schedule Calendar by one or more Caregiver(s) or Recipient(s).
- **Total Visits**: The total number of scheduled visits for the selected calendar period for each User or Recipient.
- **Date:** The date range for the selected planner or calendar period.
- **Time:** The time the visit will start; a colored bar indicates how long the visit is scheduled for.

Calendar View

You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Scheduling* > *Viewing the Schedule* > Calendar View:

Users can configure the Schedule Calendar to be displayed in Calendar View, which depicts a list chart of all scheduled visits in an agency's Mobile Caregiver+ Provider Portal. Users can switch to Calendar View by clicking the green calendar icon in the upper left corner of the Schedule Calendar screen.



The Calendar View chart displays a list report of all scheduled visits for Users and Recipients within the selected calendar period. The Calendar view chart displays:

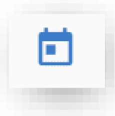
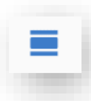
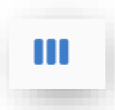
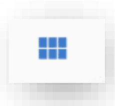
- The User/Recipient name and the start time is displayed for each scheduled visit that appears in the list.
- The days are displayed as column headers for the list.

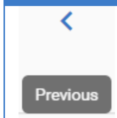
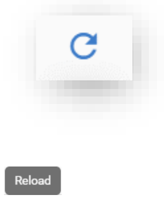
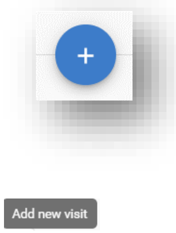
You can use the **Next** and **Previous** buttons at the top of the page to change the time period. See *General Navigation for Scheduler or Calendar View*.

General Navigation for Scheduler or Calendar View

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Scheduling* > *Viewing the Schedule* > General Navigation

Users can use the icons located in the header to configure the dimensions of the Schedule Calendar.

Icon	Description
 Today	Reset the calendar to the default view, displaying scheduled visits for the current day.
 Day	Configures the Schedule Calendar to display a daily planner, displaying scheduled visits for one day.
 Week	Configures the Schedule Calendar to display a weekly planner, displaying scheduled visits for one week.
 Month	Configures the Schedule Calendar to display Monthly planner, displaying scheduled visits for one month.
 Next	Allows Users to scroll to the next months, weeks, or days, depending on the selected planner.

Icon	Description
 Previous	Allows Users to scroll to the previous months, weeks or days depending on the selected planner.
	Reloads or refreshes the page with the most recent schedule data.
	Allows Users to schedule and add new visits to the agency's Mobile Caregiver+ Provider Portal.

Users can add a visit directly from the Schedule page by clicking the "add visit" icon,  in the upper right corner of the screen.

Related Topic

- *Adding/Scheduling Visits*

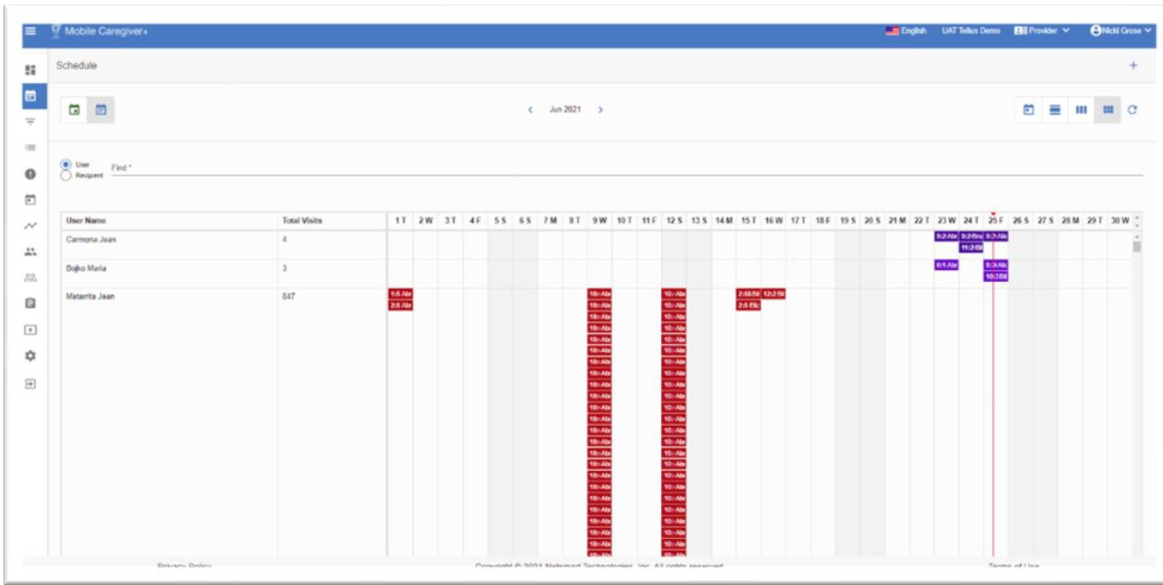
Adding/Scheduling Visits

You are here: *[Mobile Caregiver+ Provider Portal User Guide]()* > *[Scheduling]()* > Adding/Scheduling Visits

From the Schedule Calendar, Users can add or schedule a visit using the **Add New Visit** command, +. The system will display the Add New Visit form; the Add New Visit form is composed of 6 sections. Users can use the Add New Visit form to schedule single (one-time) or recurring visits.

To schedule new visits:

1. From the Main Menu click the **Schedule** or the **Visits** menu option.



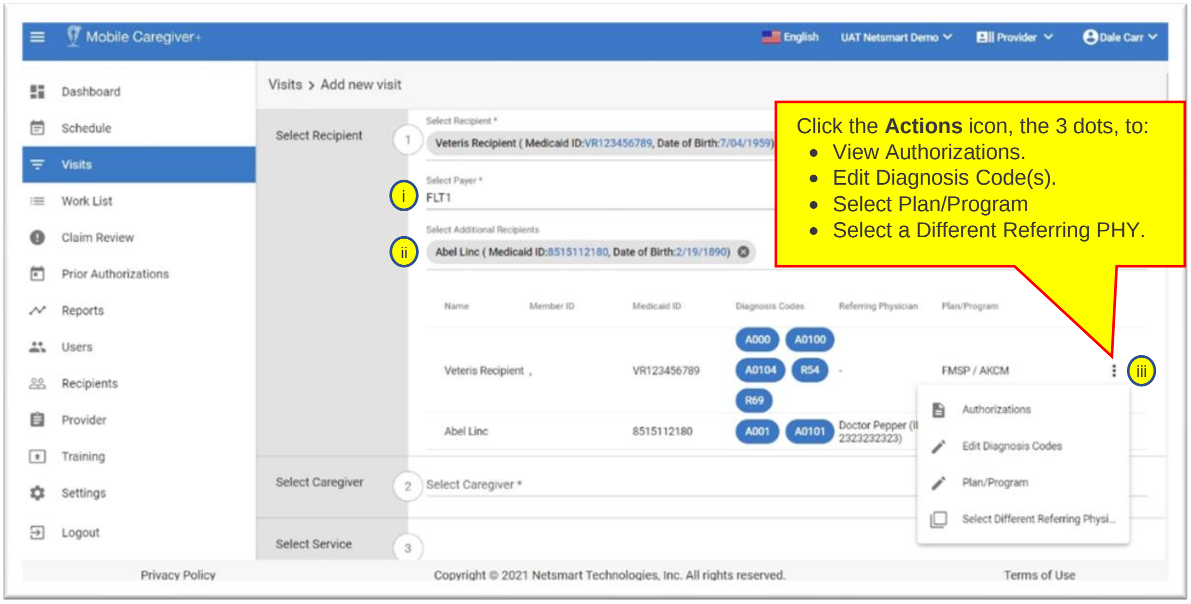
2. Click the "**Add New Visit**" icon, +, (the plus sign), located in the top-right corner of the screen.
3. From the Add New Visit form, follow the directions below, *[Adding/Scheduling Visits,]()* to configure the visit options for each section.

Completing the Add New Visit Form

You are here: [Mobile Caregiver+ Provider Portal User Guide]() > [Scheduling]() >[Adding/Scheduling a Visit]() > Adding/Scheduling Visits

Note: Please be sure adhere to the Payer's policies and procedures when scheduling visits.

Section 1 - Select Recipient(s) Options



4. From Section one, make the following entries and selections:

   i. **Select Payer**: This field is automatically populated with the default Payer that has been configured for the selected Recipient. For Recipient that are enrolled with multiple Payers Plans/Programs, click in the **Select Payer** field to select a different Payer Plan/Program.

   ii. **Select Additional Recipients**: Click in the **Select Additional Recipients** field and use the dropdown list to select additional Recipient to be scheduled to receive service(s).

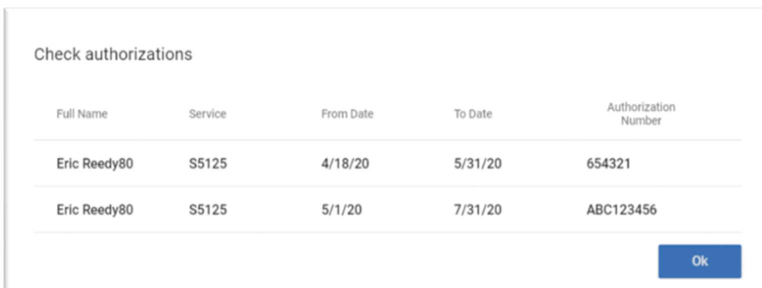
   Note: The system will automatically fill in the Diagnosis Code(s) and/or Referring Physician listed in the Recipient's Mobile Caregiver+ profile.

The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile

Not all agencies are authorized to provide services to groups; this option is determined by the Payer and Program the Recipient is enrolled with.

iii. Click the **Action** icon, ⋮, located to the right of the Diagnosis Code to select one of the following options:

- **Authorizations**: Displays a list of all authorization that are currently loaded in the Mobile Caregiver+ System for the selected Recipient.

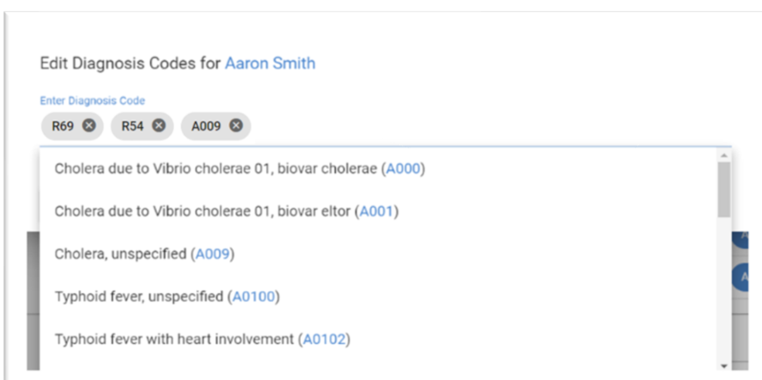


Check authorizations

Full Name	Service	From Date	To Date	Authorization Number
Eric Reedy80	S5125	4/18/20	5/31/20	654321
Eric Reedy80	S5125	5/1/20	7/31/20	ABC123456

Ok

- **Edit Diagnosis Codes:** Allows Users to add/update the Diagnosis Codes for the selected Recipient.



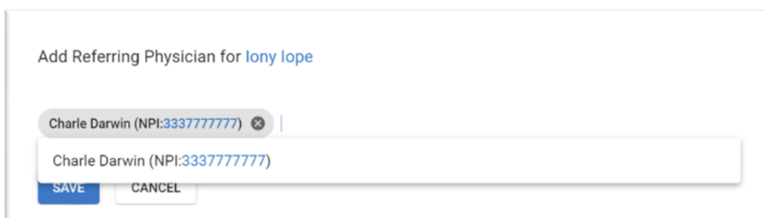
Note: It is dependent on the Payer and Program, whether Providers are able edit Recipients' Diagnosis Codes. All edits made to a Recipient's Diagnosis Code will be permanently saved to the Recipient's EVV file, even if the User does not complete scheduling the visit.

****The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile,*

.***

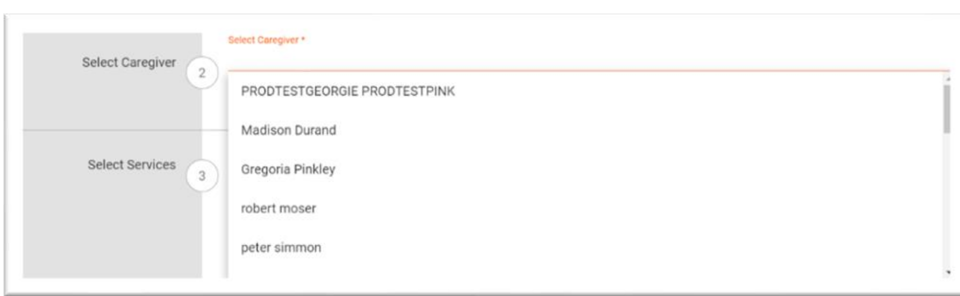
- **Select a Plan/Program:** For Recipients that are enrolled in multiple Plans/Programs with a single payer, Users can click on the shortcut labeled **Plan/Program,** then click in the **Select Plan/Program** field to view and select a different Plan/Program that the Recipient is enrolled in with the selected payer.

- **Select a Different Referring Physician**: Allows Users to change default Referring Physicians.



Note: It is dependent on the Payer and Program, whether a Recipient requires a Referring Physician for a service.

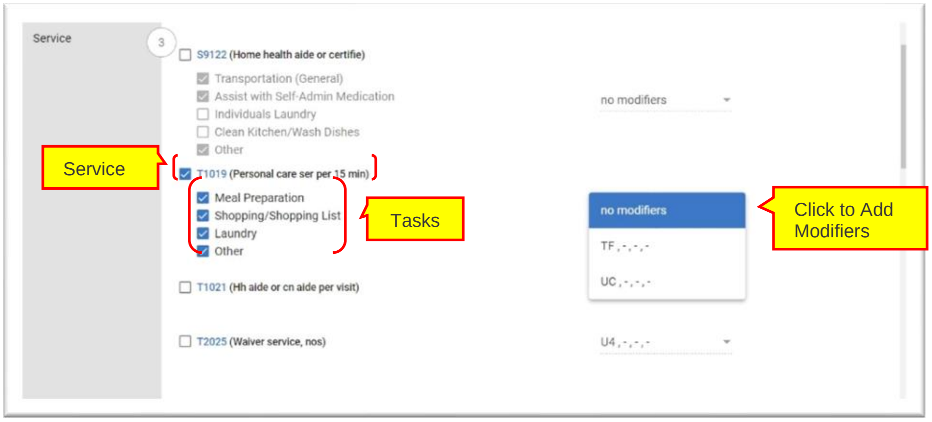
Section 2 - Select Caregiver



5. From Section 2, click in the **Select Caregiver** field and use the dropdown list to select the caregiver who will perform the visit to complete the assigned service(s) and task(s).

Section 3 - Select Services

6. The system will display a list of all billable service codes for the Payer. Depending on the Payer and program, some providers may be allowed to schedule multiple services in a single visit. Payers can also set prerequisite license/certification requirements for services.

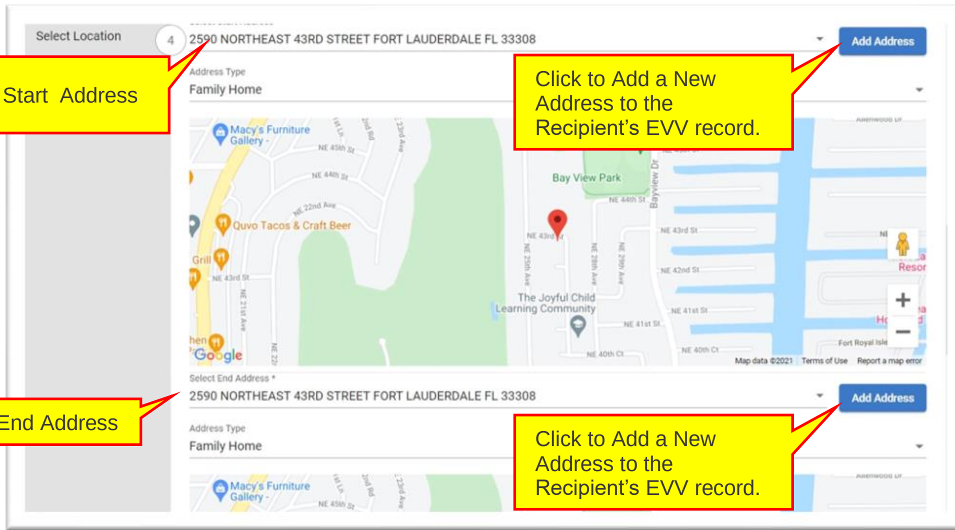


7. Select the service(s) that are being assigned by placing a checkmark in the checkbox(es) next to the respective service code(s). The system will automatically select all Tasks by placing checkmarks in the checkboxes for all listed Tasks.
    i. Deselect any Task(s) that are not being assigned by clearing the checkmarks for the respective Tasks.
    ii. Click in the Modifiers field to select any modifiers that are listed in the Prior Authorization.

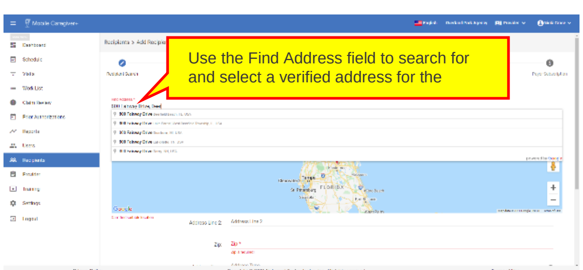
Section 4 - Select Visit Locations

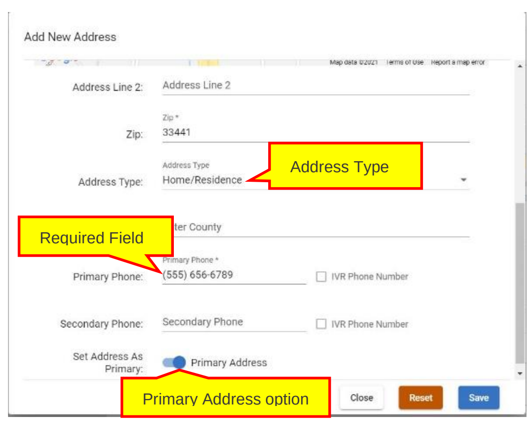
The 21st Century Cures Act stipulates that EVV visit data must include the location where the Caregiver will start rendering billable services, and the location where billable services end; by default, the Mobile Caregiver+ System will automatically load the

Recipient's designated primary address as the Start Address and End Address for billable services. Users can add new addresses to the Recipient's EVV record and/or select a stored address to be used as the Start Address and/or End Address for billable services.



8. **Select Start Address** and **Select End Address**: Both fields are automatically populated with the Recipient's primary address; if this is the correct address indicating where the visit will start and end, no further actions are required. Users can replace either the Start Address, End Address, or both.
    i. To add a new address for the Recipient, click on the **Add Address** command, .

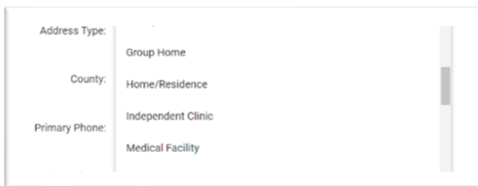




ii. **Find Address:** Start typing the new address in the Find Address field - the system will display a list of verified addresses that match the data being entered.

iii. From the list, select the correct address to be added to the Recipient's EVV record.

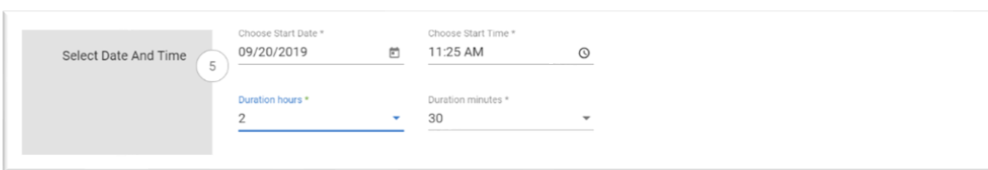
iv. **Address Type:** Click in the **Address Type** field to select the type (descriptive designation) for the service address.



v. **Primary Phone:** Enter the Recipient's phone number.

vi. **Set Address as Primary:** Place in checkmark in the checkbox to designate the new address as the Recipient's Primary Address.

Section 5 - Select Date and Time



9. In Section 5, configure the following parameters:

i. **Choose Start Date:** Manually type-in or click on the calendar icon, , to enter the date the visit will start.

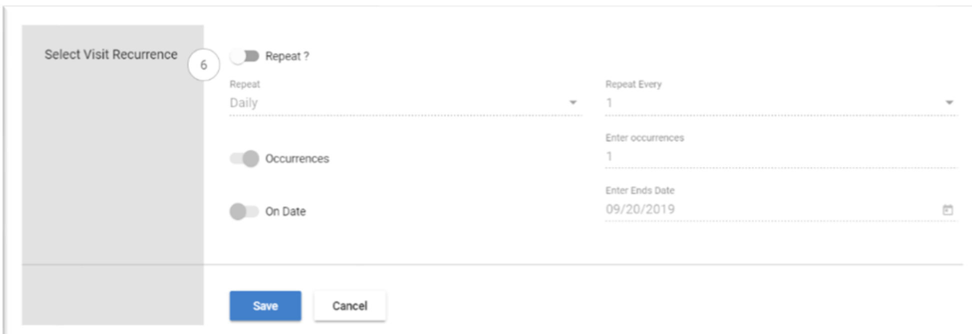
ii. **Choose Start Time:** Click on the clock icon, , to enter the start time for the visit. The time is limited to five (5)-minute increments.

*Note**:** To calculate the end date and time for the visit, Users will enter the total amount of time the Caregiver will need to complete all assigned service(s) or tasks*

iii. **Duration hours:** Enter the total number of hours in the time needed to complete all assigned service(s). For example, if the total time needed to complete all assigned services is 7 hours and 30 minutes, the User will enter “7” in the Duration hours field.

iv. **Duration minutes:** Enter the total number of minutes in the in the time need to complete all assigned service(s). For example, if the total time the need to complete all assigned services is 7 hours and 30 minutes, the User will enter “30” in the Duration minutes field.

Section 6 - Select Visit Recurrence

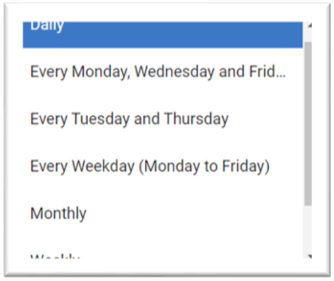


10. In section 6, configure the recurring and expiration settings for the visit: To schedule a visit as a recurring/repeating visit, the visit data being entered in sections 1 through 5 of the Add New Visit form must be identical, such as:

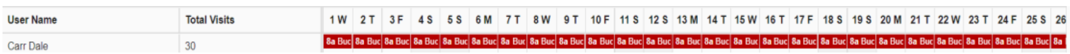
- Recurring visits must start and end at the same location.
- Recurring visits must start and end at the same time.
- Recurring visits must be for the same Caregiver and Recipient(s).
- Recurring visits must be for the same services.
- Recurring visits must include the same Tasks.

i. **Is Repeat?:** Activate the recurrence/repeat option by clicking on the “**IS Repeat?**”, , switch. The IS Repeat? switch will slide to the right and changes from white to blue when activated.

ii. **Repeat:** Use Repeat field to configure/set the recurring visit pattern/frequency.



- **Daily** – Select the Daily option to schedule a recurring visit for each day of the week.



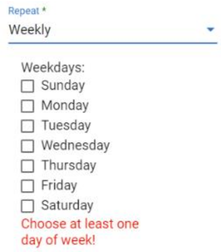
- **Every Monday, Wednesday, and Friday** – Select the Monday, Wednesday, and Friday option to schedule three (3) visits per week, on the respective days.

- **Every Tuesday and Thursday** – Select the preconfigured Tuesday and Thursday option to schedule two (2) visits per week, on the respective days.

- **Every Weekday (Monday to Friday)** – Select the preconfigured Every Weekday option to schedule weekly recurring visits for the workdays, Mondays through Fridays on a weekly basis.

- **Monthly** – Select the Monthly option when scheduling monthly recurring visits.

- **Weekly** – Select the Weekly option to configure custom weekly recurring



visits. The system will display a customizable chart, this allows Users to randomly select and configure custom combinations of days for scheduling weekly recurring visits. The Weekly recurring visit option offers the greatest flexibility for scheduling recurring visits.

- **Yearly** – Select the Yearly option when scheduling yearly recurring visits.
- **Repeat Every**: The Repeat Every option is a "skip option," which allows Users to configure the system to skip one or more of the time intervals selected for the Repeat option – Users can select a numeric value to configure the recurring visits to skip one (1) or more day(s), week(s), month(s), or year(s) based on the selected Repeat option. Please refer to the table below for additional information:

Repeat	Repeat Every	Recurring Visit Schedule
Daily	1	Every day.
Daily	2	Every other day (Every second day).
Daily	3	Every third day.
Every Monday, Wednesday, Friday	1	Mondays, Wednesdays, and Fridays each week.
Every Monday, Wednesday, Friday	2	Mondays, Wednesdays, and Fridays of every other week.
Every Monday, Wednesday, Friday	3	Mondays, Wednesdays, and Fridays of every 3rd week.
Every Tuesday and Thursday	1	Tuesdays and Thursdays each week.
Every Tuesday and Thursday	2	Tuesdays and Thursdays of every other week.

Repeat	Repeat Every	Recurring Visit Schedule
Every Tuesday and Thursday	3	Tuesdays and Thursdays of every third week.
Monthly	1	Every Month.
Monthly	2	Every other month (Every Second month).
Monthly	3	Every third month (Quarterly).
Yearly	1	Every year.
Yearly	2	Every other year.
Yearly	3	Every third year.

Configure the recurring visit's expiration option. The User can select one of two expiration options for the recurring visit:

i. **Occurrences**: Click on the **Occurrences** switch to activate the expiration option; the Occurrence option allows Users to enter the total number of recurring visits (occurrences) to add to the EVV System.

ii. **Enter Occurrence**: Enter the numeric value for the total number of recurring visits to add to the EVV System in the Enter Occurrence field.

Or

i. **On Date**: Click on the **On Date** switch to activate the expiration option; the On Date option allows Users to schedule recurring visits up to a set date. Recurring visit can be scheduled up to 1 year (52 weeks) from the Start Date entered in section 5.

ii. **Choose end Date:** Either manually type or click on the calendar icon and enter the end date.

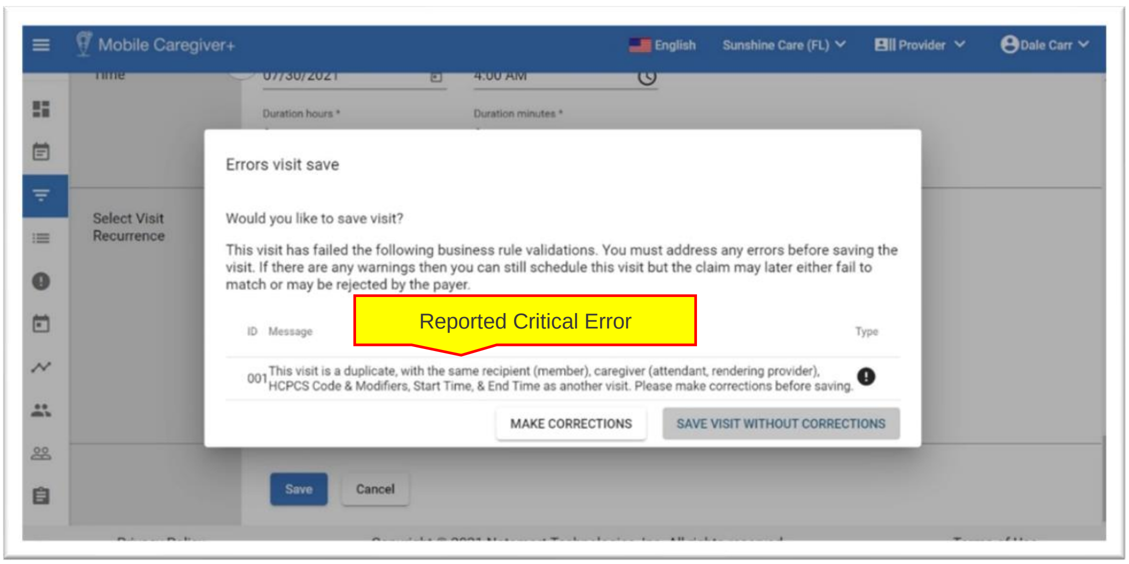
Note: Users can either choose the Occurrences or On Date expiration option; Users cannot choose both.

11. Click the blue **Save,** 

, command, located at the bottom of the Add New Visit form to save the scheduled visit.

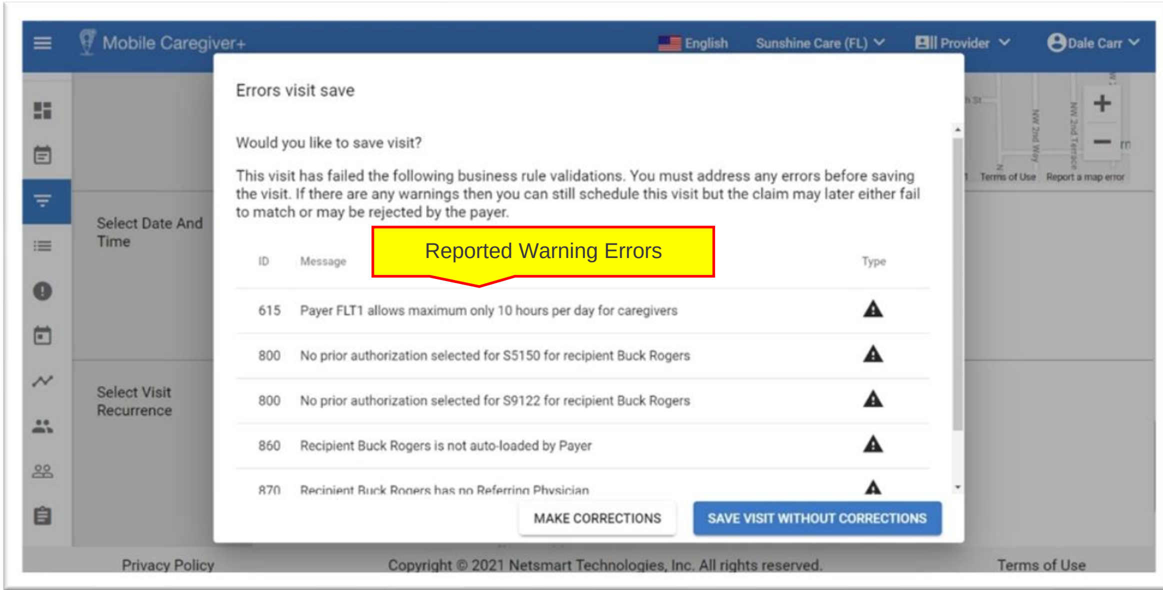
The system will use the designated Payer's business rule to screen the scheduling entries to ensure that the visit adheres to the Payer's policies and procedures. The system will return one of three outcomes:

- ***No Error**: The visit being scheduled has no reported error; the system will automatically save the visit.*
- ***Critical Error***: A Critical Error indicates that the visit being scheduled has at least one major fault and cannot be saved – Users will only be given the option to MAKE CORRECTIONS for the displayed error(s)/fault(s).



Note: Users must click the MAKE CORRECTION command and fix reported critical error before a visit can be saved.

- ***Warning Error***: A Warning Error indicates that the visit being scheduled has at least one fault, but User can select SAVE VISIT WITHOUT CORRECTIONS – Users will only be given the option to SAVE VISIT WITHOUT CORRECTIONS for the displayed error(s)/fault(s).



Note: Users have the option to choose to click the MAKE CORRECTION command and fix reported warning error before saving the visit or click the SAVE VISIT WITHOUT CORRECTIONS command to save the visit and make corrections later.

Visits that have no reported errors/faults will automatically be added to the Provider's EVV Portal – no further actions are required from the user.

Related Topic

- *Viewing the Schedule*

Managing Scheduled Visits

You are here: *Mobile Caregiver+ Provider Portal User Guide* > Managing Visits

The Visits List displays a list chart, which depicts all scheduled visits in a Provider's Mobile Caregiver+ Provider Portal. The Visits menu option allows providers to search for, view and manage scheduled visits. Providers can add new visits to their EVV Portals by clicking on the **Add New Visit** command, +, located in the top-right corner of the screen. (See *Adding/Scheduling Visits* for more information).

Click a topic below:

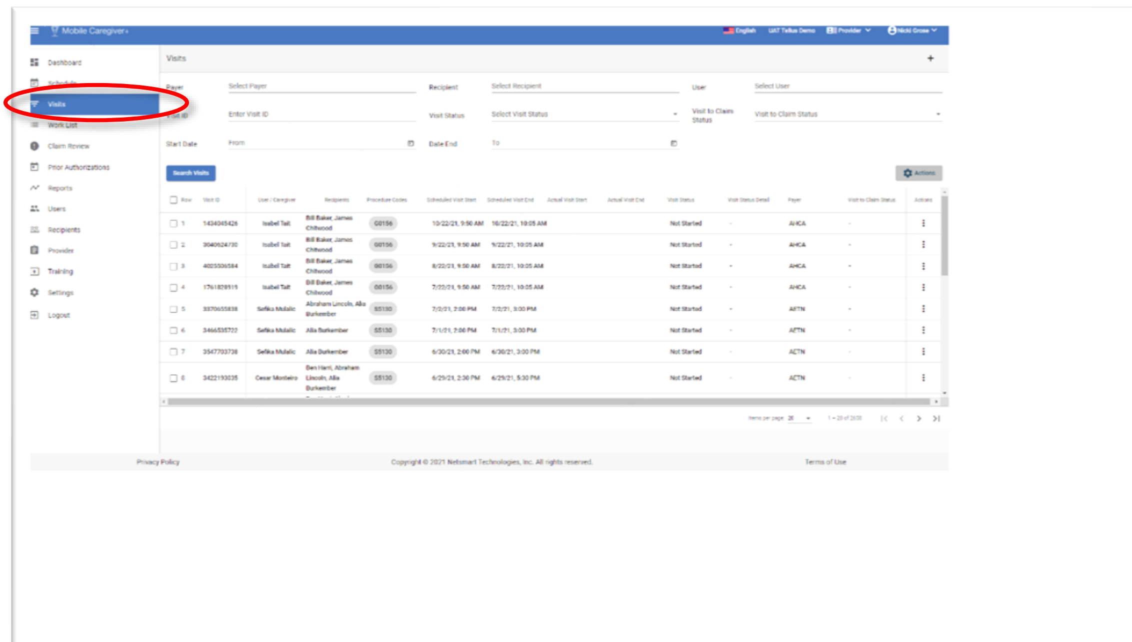
Accessing the Visits List

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Accessing the Visits List

To access Visits list:

1. From the Main Menu**,** click **Visits**.

   The system will display a list chart depicting all scheduled visits for the active agency.

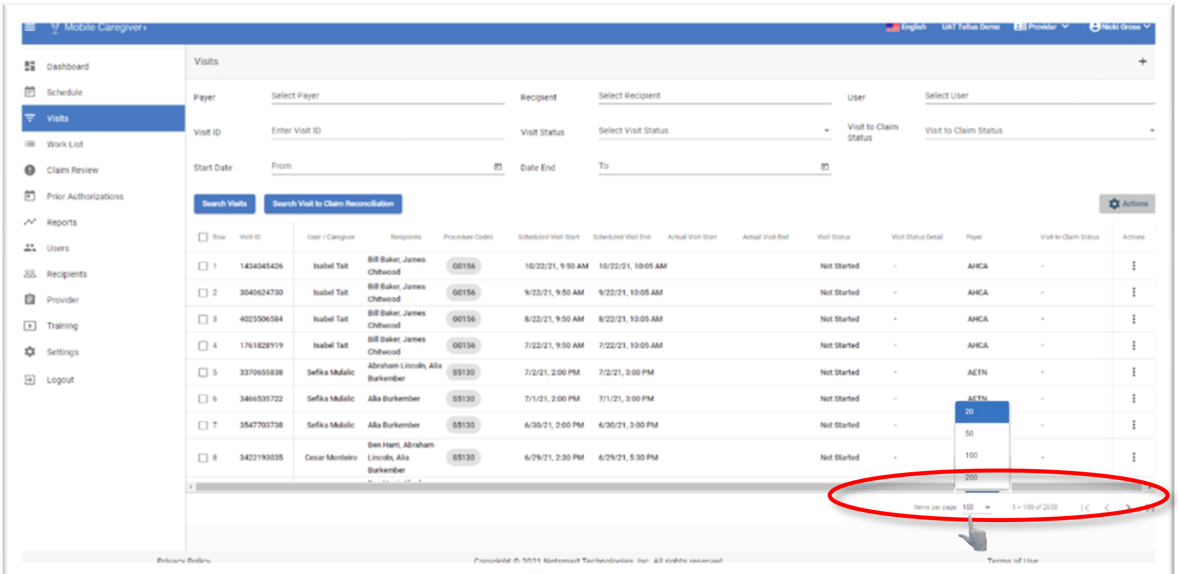


Changing the Number of Visits Displayed Per Page

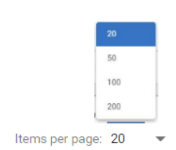
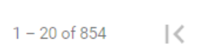
You are here: *[Mobile Caregiver+ Provider Portal User Guide]* > *[Managing the Visits List]* > Changing the Number of visits Displayed Per Page

By default, the Visits list will display 20 records at-a-time on the screen; to change the number of visits or records that are displayed on each page:

1. Scroll to the bottom of the **Visits** list.
2. Click the **Items per page** dropdown list arrow and select the number of records to be displayed per screen.



If there are multiple pages. Use the navigation arrows (icons) to scroll through the pages.

Icon	Description
	Used to set the number of records (visits) to display on the page (screen) – Users may have to scroll down to see all visit.
	Navigate to the first page of visits.

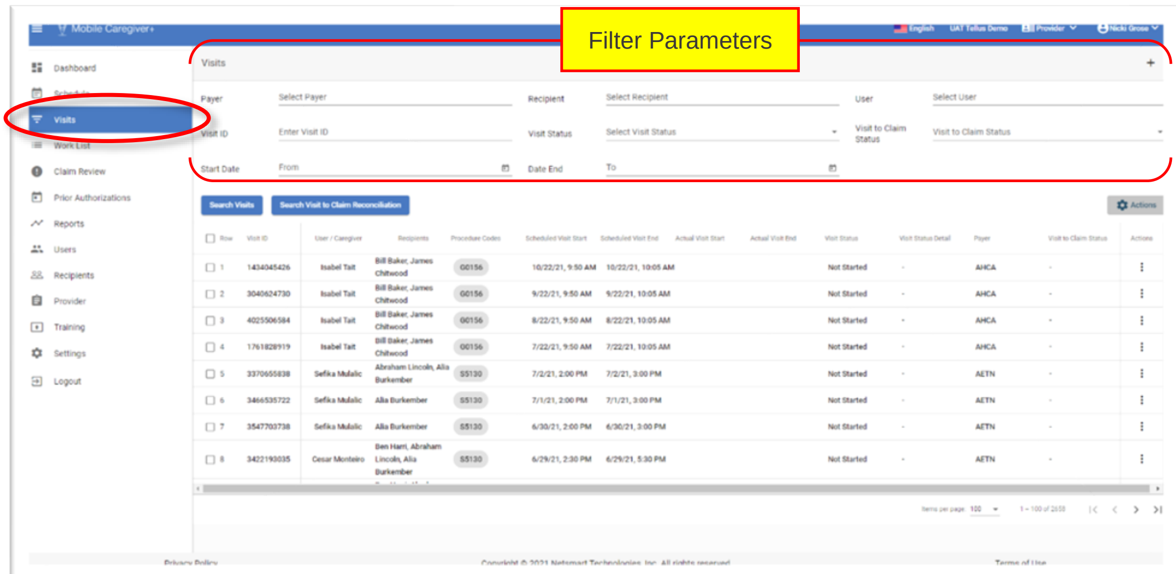
Icon	Description
1 – 20 of 854 ‹	Navigates back to the previous page of visits.
1 – 20 of 854 ›	Navigates forward to the next page of visits
1 – 20 of 854 ›|	Navigates to the last page of visits.

Managing the Visits List

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Filtering the Visits List.

To filter the Visits List:

1. From the Main Menu, click **Visits**.



Users can filter the Visits list by using the fields located in the header – Users can filter the Visits list by entering/selecting one or more search parameters in one or more of the following fields:

Field Name	Filter Description
Payer	Display a list of all payers that are configured for the active agency. Users can select a payer to filter the Visits list to only display visits that are scheduled for Recipients insured by the selected payer. Users must select a payer to use the **Search Visit to Claim Reconciliation** function.
Recipient	The Recipient field has a list of all active Recipients that are enrolled with the active agency. Users can filter the Visits

Field Name	Filter Description
	list by selecting one or more Recipients – The system will only display visits for the selected Recipient(s).
User	The User field will display a list of all Users that are linked to the active agency. Users can select a User (Caregiver) to filter the Visits list to only display only visits that are scheduled for the selected User.
Visit ID	The Visit ID field allows Users to search for a specific visit. Users can enter a Visit ID to filter the Visit list to display a specific visit.
Visit Status	The Visit Status field displays a list of visit statuses for scheduled visits i.e., **IN PROGRESS, UNALBLE TO COMPLETE, MISSED, NOT STARTED, NOT STARTED, LATE, IN PROGRESS, LATE, COMPLETED** and **COMPLETED, LATE.** Users can select a Visit Status to filter the Visits list to only display visits whose statuses match the selected status.
Visits to Claim Status	The Visit to Claim Status field displays one of two processing statuses for completed visits i.e., **SUCCESS** or **ERROR.** Users can select one of the two Visit to Claim Statuses to filter the Visits list to only display visits that match the selected status.
Start Date	Users can filter the Visits List to only display visits that are scheduled for a specific date rate – Users must enter the Start Date in combination with an End Date to filter the Visits list by the specified date range.
End Date	Users can filter the Visits List to only display visits that are scheduled for a specific date rate – Users must enter the

Field Name	Filter Description
	End Date in combination with a Start Date to filter the Visits list by the specified range.
Search Visits	Users must click the blue Search Visits command to see the list of visits that match the search parameters – Users must click the blue Search Visit command to update the list after making any changes to the search parameters.
Search Visit to Claims Reconciliation	The Search Visit to Claim Reconciliation function is a tool which can be used to view current claim status information for completed visits – The Visit to Claims Reconciliation can be used to view the status of billable services in the Work List and in Claims Review. Users must select a Payer to use the Visit to Claims Reconciliation function.

2. Click the blue **Search Visits** command after selecting all filter parameters.

Related topics:

- *Adding/Scheduling Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Managing Scheduled Visits*
- *Printing Visit Details*
- *Deleting Not Started Visit*

Viewing Visit Status Details

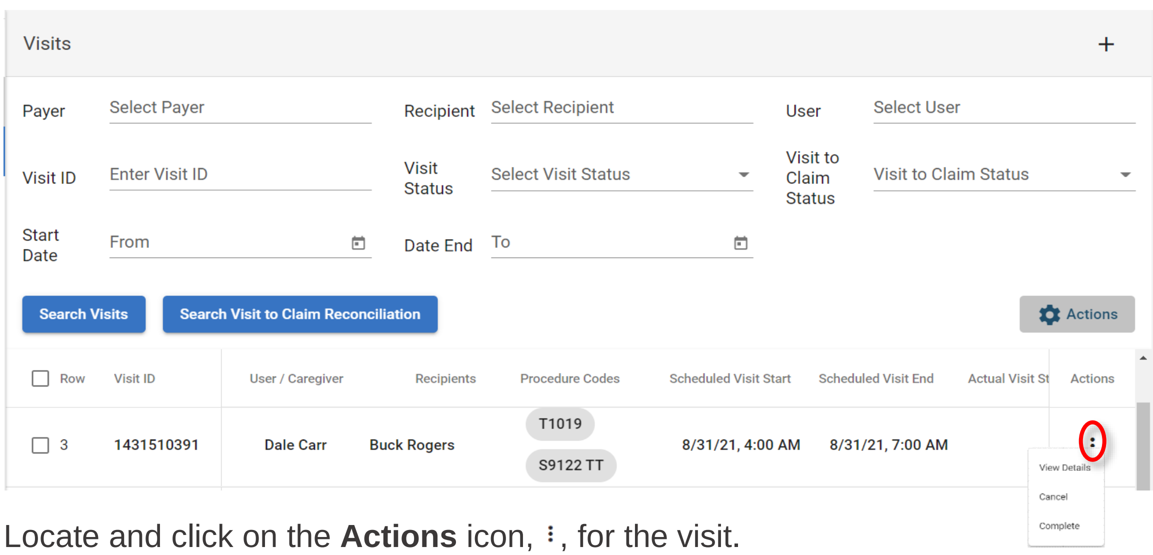
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Viewing Visit Details

The Visit Status Detail screen displays scheduling, status, and reported EVV visit data for scheduled visits. Users can use the Visit Status Details screen to view the following:

- Details, i.e., Recipient, Caregiver, Scheduled Start/End Time, Services, etc. for scheduled visits.
- Status information, i.e., Completed, Unable To Complete, In Progress, etc. for scheduled visits.
- Actual reported data for visits that are currently happening or visit that have been completed.

There two ways to access Visit Status Detail screen:

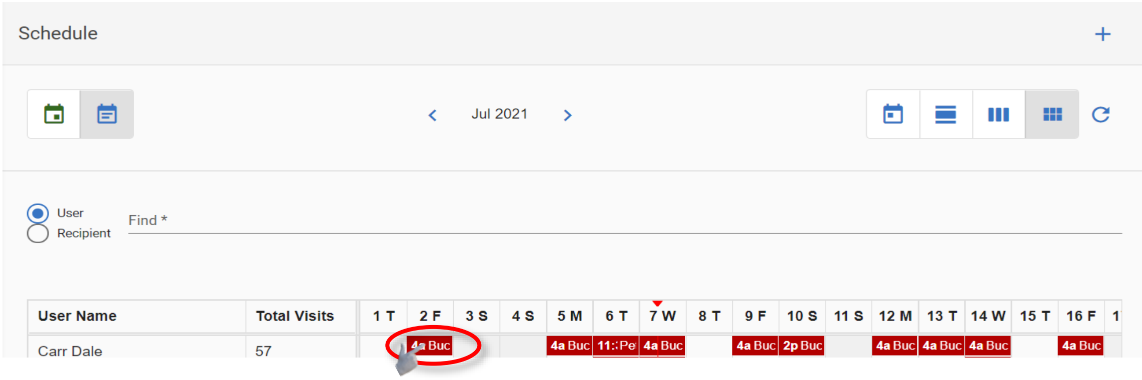
1. From the Main Menu, click Visits.



2. Locate and click on the **Actions** icon, ⋮, for the visit.
3. From the shortcut submenu, click **View Details** The system will display the Visit Status Detail screen for the respective visit.

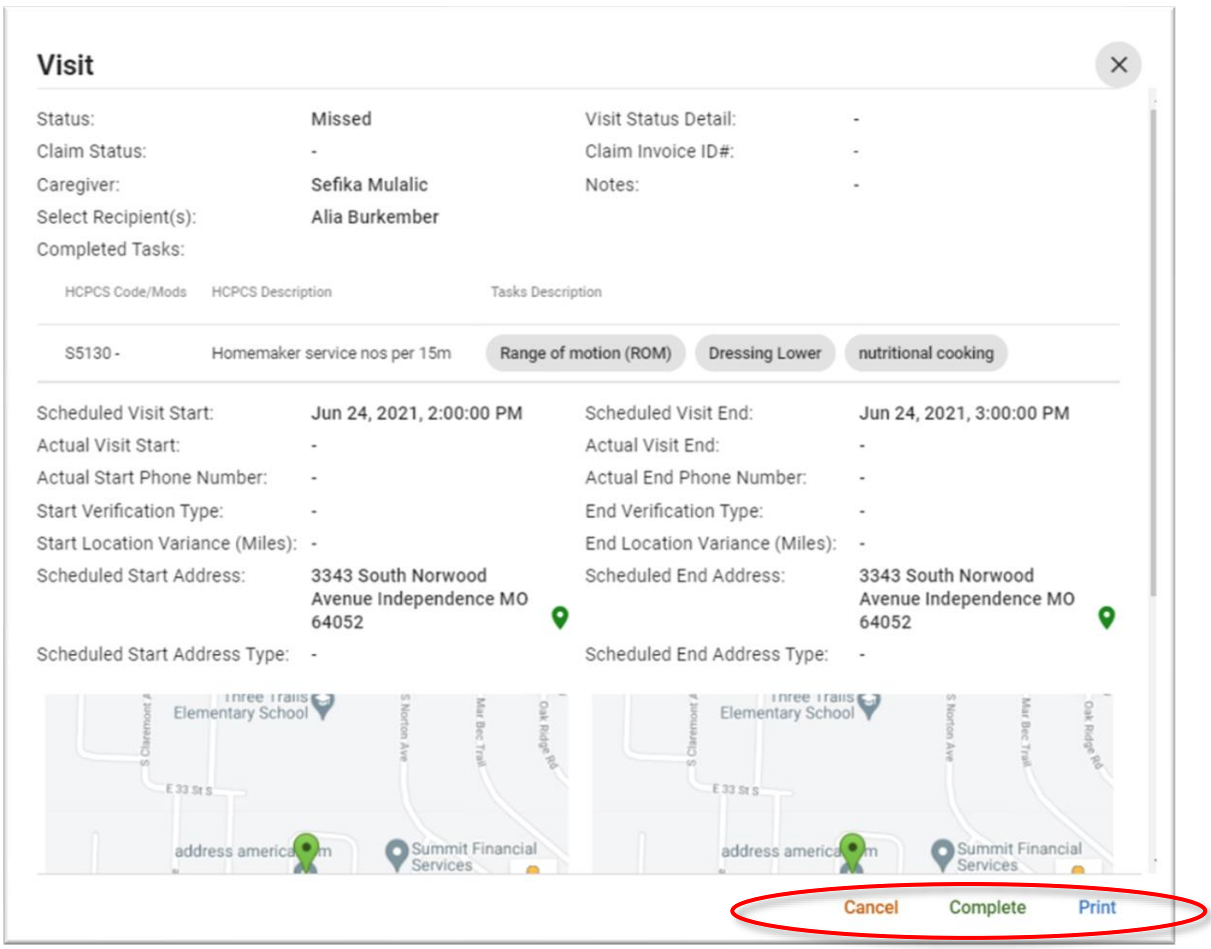
   Or

1. From the Main Menu, click Schedule.



2. Locate and click on the bar chart icon, 4a Buc, that represents the visit.

The system will display the Visit Status Detail screen for the respective visit.

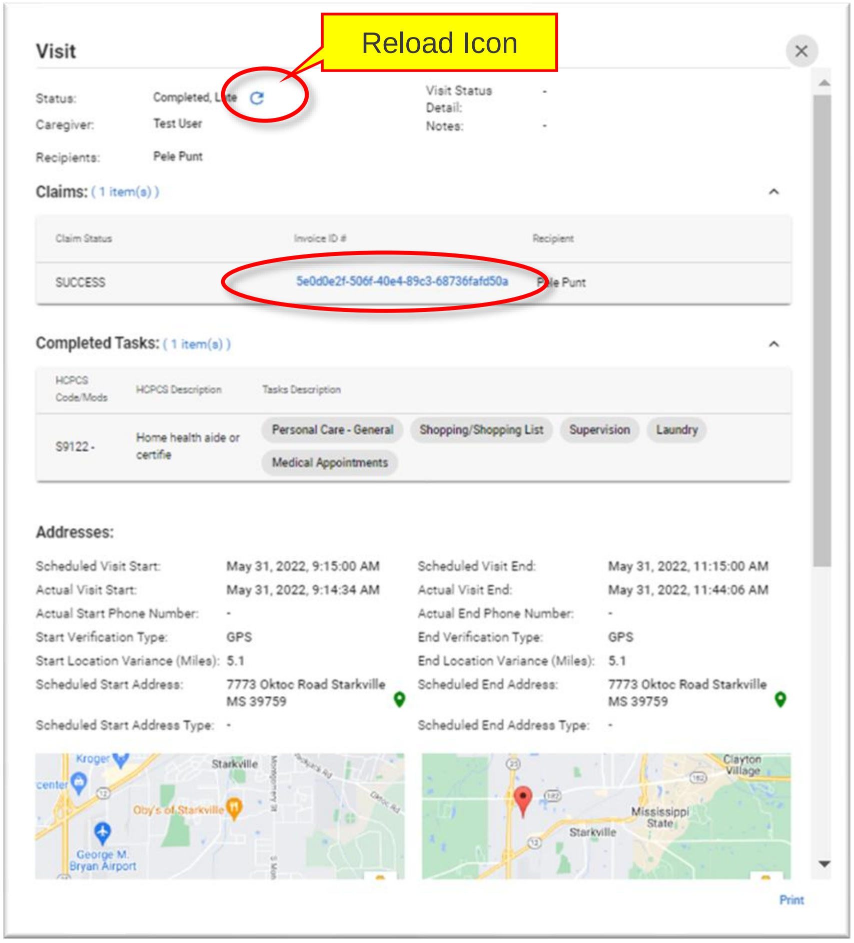


The system will display the available User options in the lower right corner of the Visit Status Detail screen. Depending on the Status of the visit, Users will have *one or more of the following options (please review the Visit Status Report for descriptions of Mobile Caregiver+ visit statuses):*

Status	User Options
In Progress	User will can manually complete visits that have an **In Progress** status.
Unable To Complete	Users will not be able to modify any visits that have an **Unable To Complete** status.
Missed	Users will have access to **Cancel visit** or **Complete visit** options for any visits that have a **Missed** status.
Not Started	Users will only have access to the **Edit Visit** or **Delete visit** options for any visits that have a **Not Started** status.
Not Started, Late	Users have the option to**, Edit**, **Cancel** or **Complete** any visit that has a **Not Started, Late** status.
In Progress, Late	Users will only be given the **Complete visit** option for any visits that have an **In Progress, Late** status.
Completed	Users will not be able to modify any visits that have a **Completed** status.
Completed, Late	Users will not be able to modify any visits that have a **Completed Late** status.

Note: The system will display the View Printable Visit option for all visits in the Visit Status Detail screen, regardless of the visit status.

All Visits that have a "Completed" or "Completed, Late," status will display a "Reload" icon, , that Users can click to reprocess billable services that were completed in the visit. Users can use the reload command to reprocess visits that have an Error reported for their Visit to Claims Status. Billable services must be successfully processed to generate a Claim Invoice ID# for each billable service, which will then be transferred to the Work List. The Visit to Claims Status field will display Success for billable services that are successfully processed and transferred to the Work List.



Note: The Claim Review, Work List and Prior Authorizations menu option are used for claim processing and are discussed in the Mobile Caregiver+ Claims Console User Guide, which is available from the Training menu option.

Related topics:

- *Adding/Scheduling Visits*
- *Viewing Visit Details*
- *Manually Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Managing Scheduled Visits*
- *Printing Visit Details*
- *Deleting Not Started Visit*

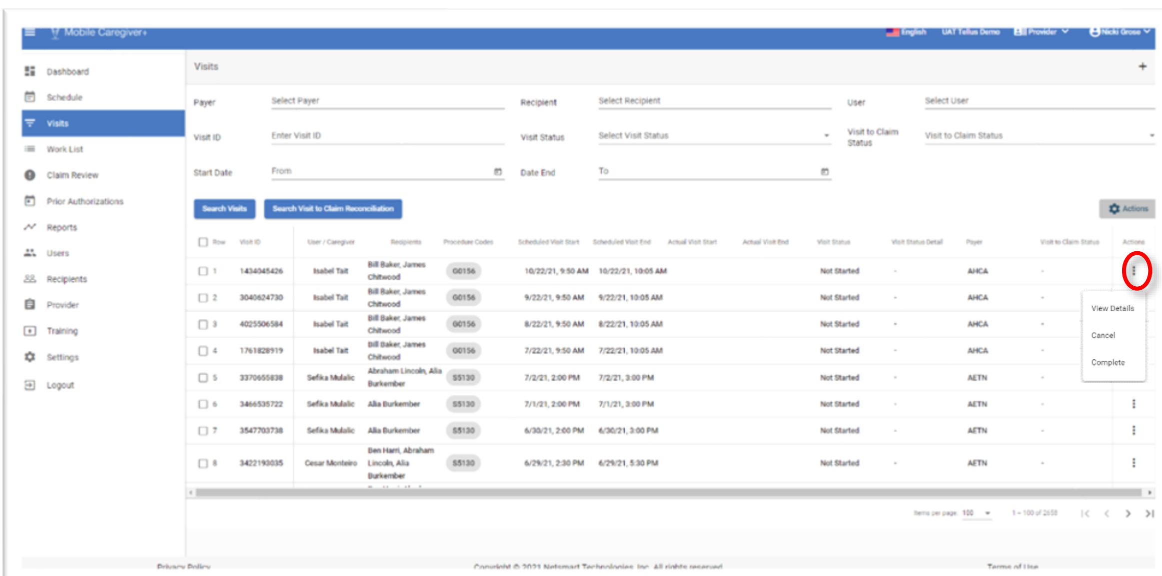
Manually Completing a Visit

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Manually Completing a Visit

If a Caregiver completes a scheduled visit without using the Netsmart Mobile Caregiver+ app, the visit will be labeled as a ***Missed*** visit. Provider Admins can manually complete ***Missed*** visits using the Mobile Caregiver+ Provider Portal. Provider Admins can manually complete scheduled visits with the following statuses: ***Missed***; ***In Progress***; ***In Progress, Late***; and ***Not Started, Late***.

To manually complete a visit using the Provider Portal:

1. From the Main Menu**,** Click **Visits**.



2. Find the visit you want too manually complete.
3. Click on the Actions icon, ⋮, of the visit.
4. From the shortcut submenu, click **Complete**.
5. Scroll down to the center of the Complete Visit form, just below the map.
6. Configure the values for the following fields:
   i. **Enter your note**: Provider Admins are required to enter a mandatory note. The note should include any relevant information related to the visit.

ii. **Choose Start/ Date*:*** The system will display the date that the visit was scheduled to occur. If the visit was not started on the scheduled date, enter the actual date the visit started/ended.

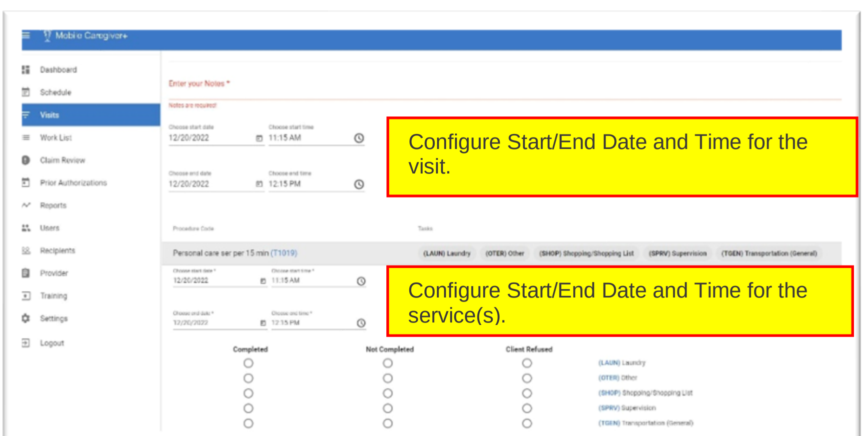
iii. **Choose Start/End Time**: The system will display the time that the visit was scheduled to occur. If the visit was not started at the scheduled time, enter the actual time the visit started/ended.

iv. **Choose Start/End Date*:*** The system will display the date that the visit was scheduled to occur as the default start and end date for the service. If the service was not started on the scheduled date, enter the actual date the service started/ended.

v. **Choose Start/End Time**: The system will display the time that the visit was scheduled to occur as the default start and end times for the service. If the service was not started at the scheduled time, enter the actual time the service actually started/ended.

*Note**:** The **Choose Start/End Times** configured for the service(s) will be used to calculate the number of billable units:*

vi. **Configure Assigned Tasks:** For each assigned Task, use the respective radio buttons to indicate whether the task was **Completed, Not Completed,** or if the **Client Refused.**



7. Click the blue **Save** command to save the data and to exit the Complete visit form.

   Or, click **Cancel** to discard all entries and to exit the Complete visit form.

Related topics:

- *Adding/Scheduling Visits*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Canceling a Missed or Late Visit*
- *Updating a Visit*
- *Printing Visit Detail*
- *Deleting a Visit*

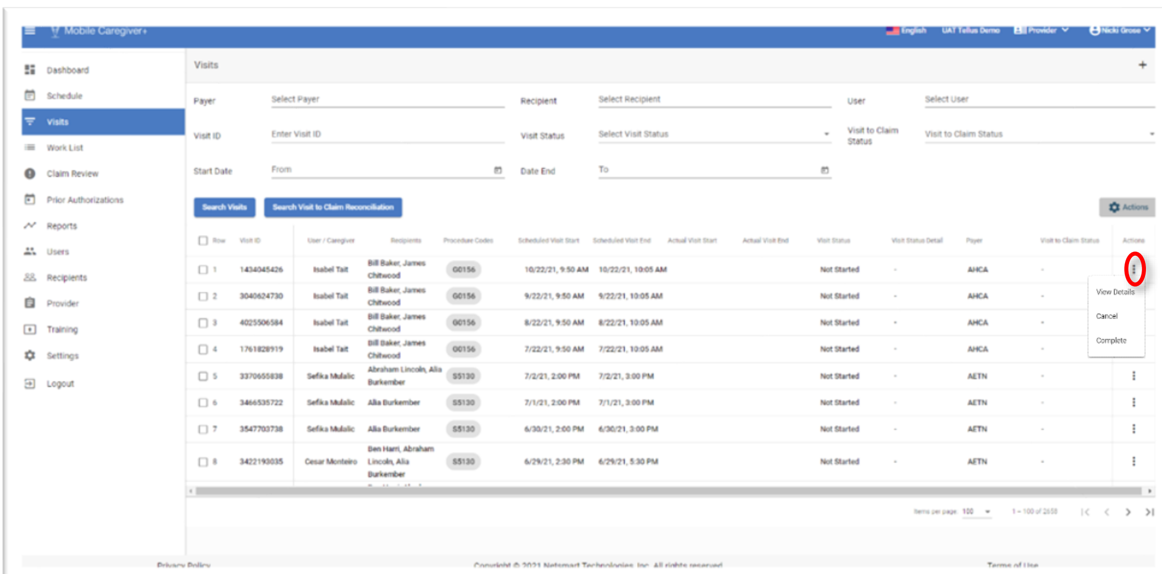
Canceling Missed and Not Started, Late Visits

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Canceling Missed and Not Started, Late Visits

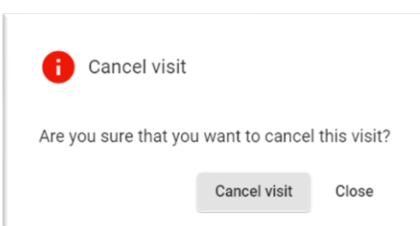
Users can cancel visits with *Missed* or *Not Started, Late* statuses. Users will be given the option to *Delete* future visits with *Not Started* statuses. Users will have the option to *delete the visit* rather than cancel it.

To cancel a visit:

1. From the Main Menu, click **Visits**.

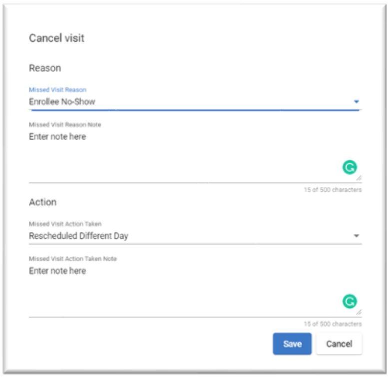


2. Find the visit you want to cancel and click the **Action** icon, ⋮.
3. From the shortcut submenu, click **Cancel**.



4. From the Cancel visit confirmation dialog box, click **Cancel visit.**

Caregiver are required to select a Reason/Action Code for canceled visits. Depending on the Reason/Action Code selected, Caregivers may be required to enter a note providing to provide additional details for canceling the visit.



5. Click in the **Missed Visit Reason** field and select a Reason Code for canceling the visit.

   Depending on the selected Reason Code, you may be required to enter a note to provide additional information for canceling the visit.

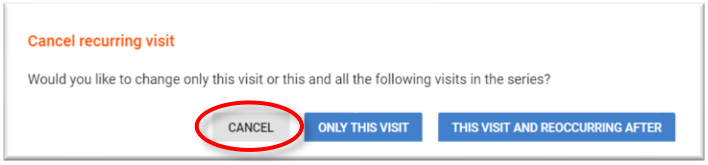
   Click in the **Missed Visit Reason Note** field to enter a note providing additional details.

6. Click in the **Missed Visit Action Taken** field and select an Action Code for canceling the visit.

   Depending on the selected Action Code, you may be required to enter a note to provide additional information for canceling the visit.

7. Click in the **Missed Visit Action Taken Note** field to enter a note providing additional details.
8. Click **Save**.

   *Note: If the visit is a recurring visit, the system will display the **Cancel recurring visit** dialog box. Users will have the option to cancel the selected visit (**ONLY THIS VISIT)**, or to cancel the selected visit all other upcoming visits in the series **(THIS VISIT AND REOCCURRING AFTER**).*



After the selecting the recurring visit cancel option, the system will display the Cancel visit confirmation dialog box (Review steps 5 through 8 for instructions).

Deleted and Canceled visits will be displayed in the EVV system with a status of "Unable to Complete."

Related topics:

- *Adding/Schduling Visits*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Updating a Visit*
- *Printing Visit Detail*
- *Deleting a Visit*

Editing/Rescheduling Visits

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Editing/Rescheduling Visits

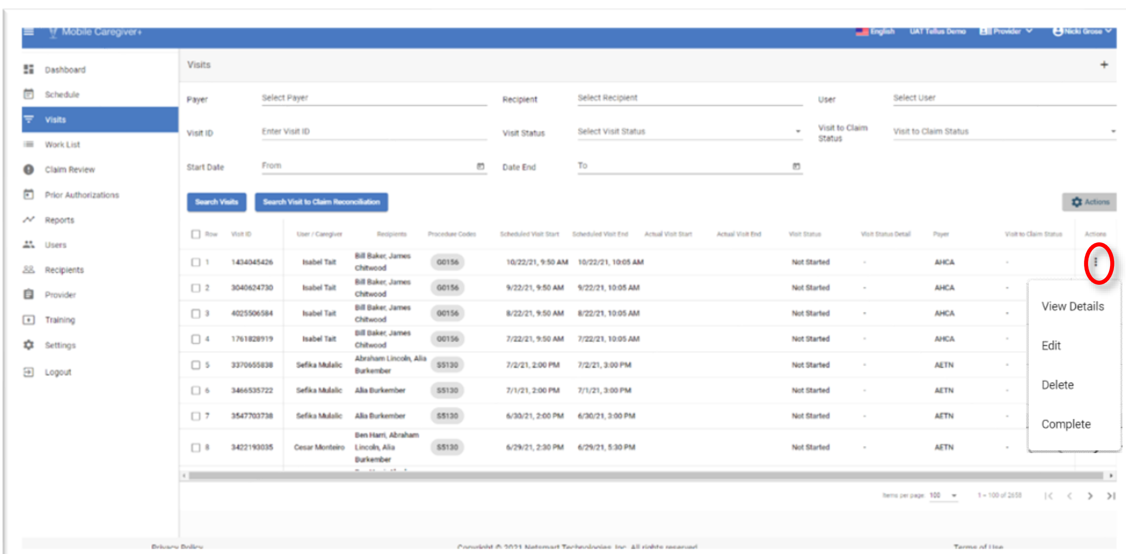
Provider can edit scheduled visits to modify one or more of the following:

- Recipient data, i.e., Diagnosis Code and/or Referring Physician.
- Change the assigned Caregiver.
- Modify assigned Services, Tasks, and Modifiers.
- The scheduled Start/End Address(es).
- The scheduled Start Date and/or Start Time.
- Recurring visit settings and expiration.

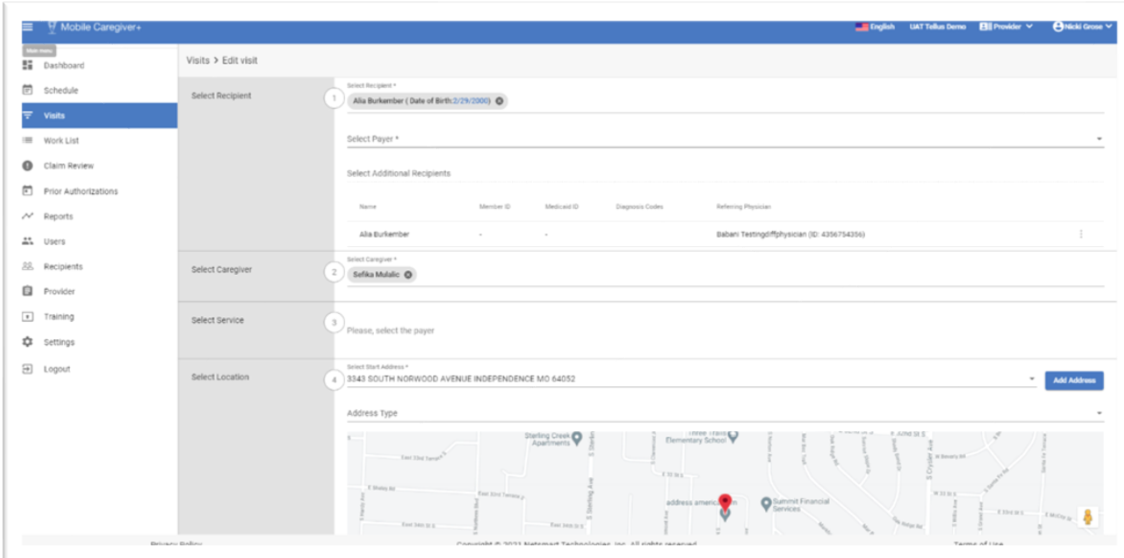
Users can edit scheduled visits that have a *Not Started or Not Started Late status*.

To edit scheduled visits, users can access the ***Visit Detail*** and click the Edit option or:

1. From the Main Menu, click **Visits**.



2. Search for the Not Started visit and click the **Action** icon, ⋮.
3. From the shortcut submenu, click **Edit** to view the Edit visit form.



Note: The Edit Visit form is identical to the Add new Visit form – The Edit Visit form allows Provider Admins to make corrections and update scheduled visits by editing/rescheduling data entries that were made in all six (6) sections of the Add New Visit form. Please refer to the instructions for [Adding/Scheduling Visits] for detailed information on how to edit/reschedule existing visits.

All changes can be applied to a single visit, the selected visit, or to the selected visit and all scheduled recurring visits that follow.

Section 1 – Select Recipient(s)

Users can edit the following entries:

- Select or remove additional Recipients.
- Edit/update the Recipient's Diagnosis Code.
- Select a different Referring Physician.

Section 2 – Select Caregiver

- Used to switch the scheduled Caregiver.

Section 3 – Select Services

Users can edit the following entries:

- Edit/update the assigned services and Tasks.
- Edit/update Service Modifiers.

Section 4 – Select Visit Locations

Users can edit the following entries:

- Edit/update the scheduled Start and End Address(es).
- Add additional addresses and change Primary Address.

Section 5 – Select Date and Time

Users can edit the following entries:

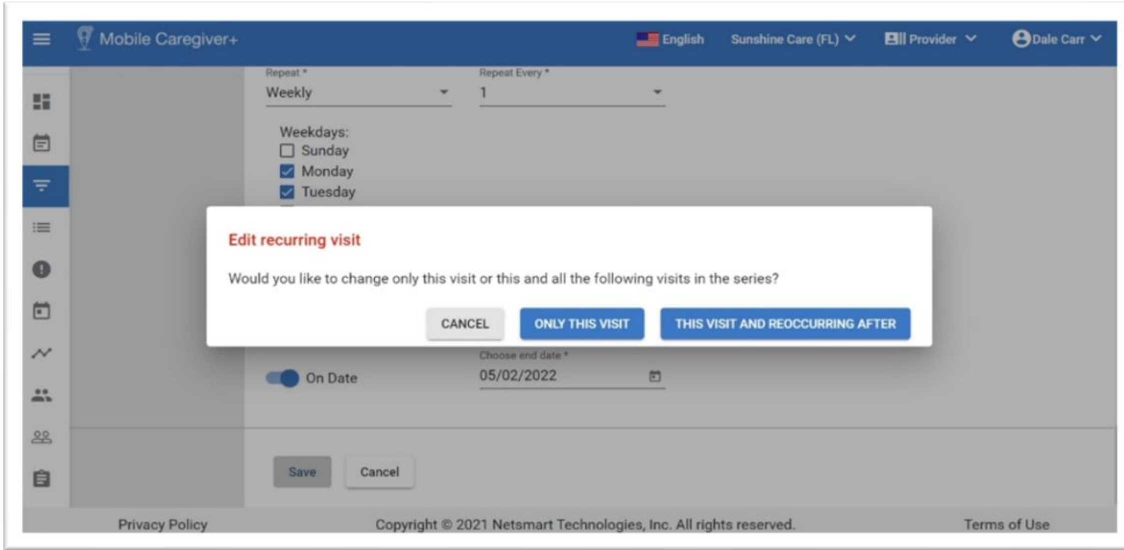
- Edit/update the scheduled Start Date and/or the scheduled End Time.
- Edit the visit duration.

Section 6 – Select Visit Recurrence

Users can edit the following entries:

- Edit/update the Repeat pattern.
- Edit/update the Repeat Every, skip, interval.
- Change the expiration option.
- Edit the expiration date. Users can extend the expiration date by activating the **On Date** switch and entering a later date that is within 1 year of the Start Date. The system will automatically reset the Start Date to the current date, thereby allowing Users to extend the date by one year from the current date.

4. Users should review all scheduling entries and then click the blue **Save** command to add the visit(s) to the Provider's EVV Portal.



If this is a recurring visit, the system will display the Edit recurring visit dialog box before screening the visit using the Payer's rule engine. User can select one of two options to apply changes to recurring visits.

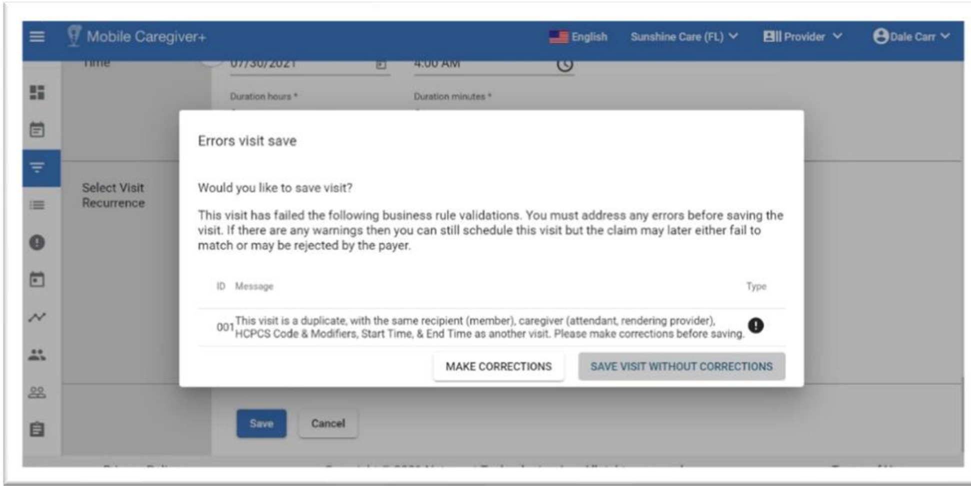
I. If the changes made are only being applied to the selected visit, then click the blue **ONLY THIS VISIT** command.
Or

I. Click the **THIS VISIT AND RECURRING AFTER** command to cancel the selected visit and all recurring visits after it.

5. Click the **ONLY THIS VISIT** command to only apply the changes to the selected visit, or click the **THIS VISIT AND RECURRING AFTER** command to apply the changes to the selected visit and all future recurring visits

The system will then use the designated Payer's business rule to screen the scheduling entries to ensure that the visit adheres to the Payer's policies and procedures. The system will return one of three outcomes:

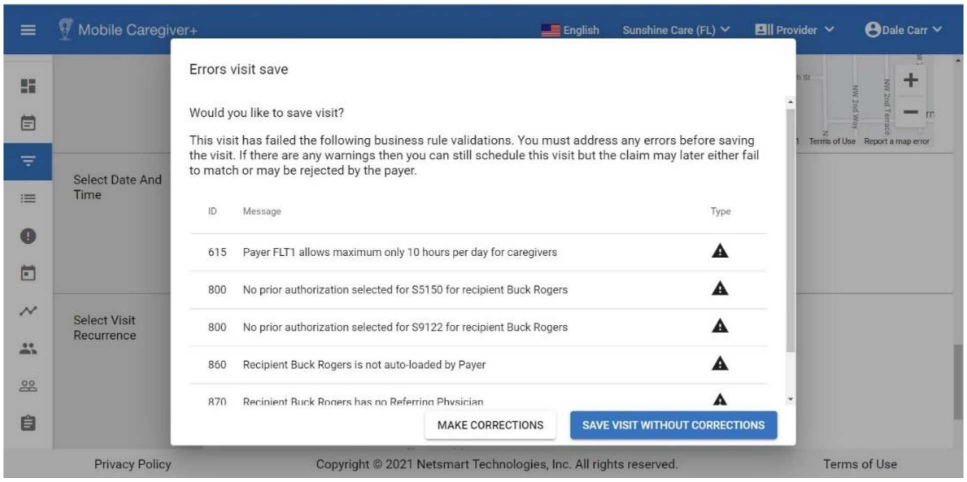
I. ***Critical Error***:



A Critical Error indicates that the visit being scheduled has at least one major error and cannot be saved – Users will only be given the option to MAKE CORRECTIONS for the displayed error(s).

Note: Users must click the MAKE CORRECTIONS command and fix reported critical error before visit can be saved.

II. **Warning Error**:



A Warning Error indicates that the visit being scheduled has at least one fault, but User can SAVE VISIT WITHOUT CORRECTIONS – Users will only be given the option to SAVE VISIT WITHOUT CORRECTIONS for the displayed error(s)/fault(s).

*Note: Users have the option to click the **MAKE CORRECTION** command and fix reported warning error before saving visit or click the SAVE VISIT WITHOUT CORRECTIONS command to save the visit and make corrections later.*

III. **No Reported Errors**

***No reported errors**: Visits that have no reported errors/faults are automatically added to the Provider's EVV Portal.*

6. If prompted, click **MAKE CORRECTIONS** to edit any reported error and try to resave the visit, or for visit with warnings, click **SAVE VISIT WITHOUT CORRECTIONS** to save the changes.

Related topics:

- *Adding/Scheduling Visits*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Printing Visit Detail*
- *Deleting a Visit*

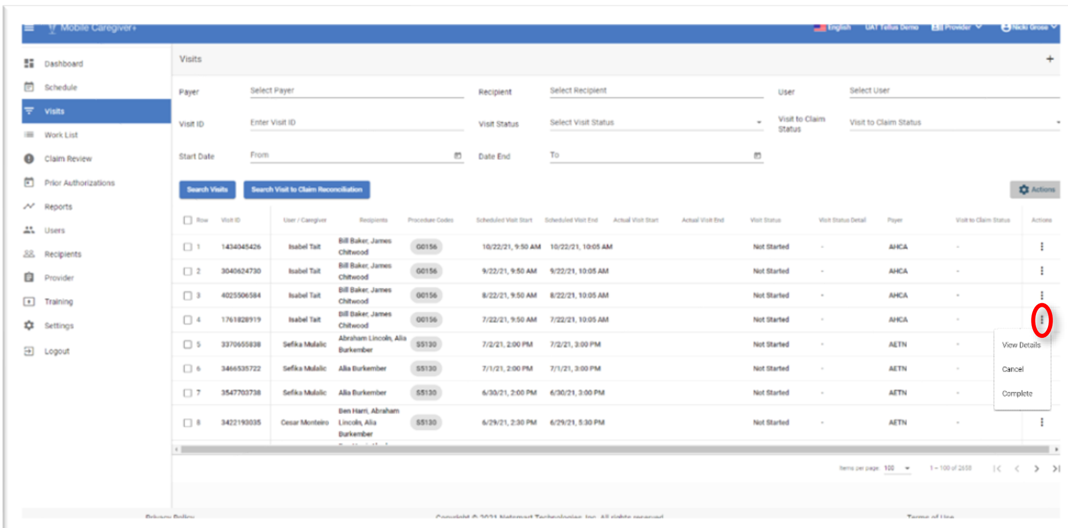
Viewing/Printing Visit Detail

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Printing Visit Detail

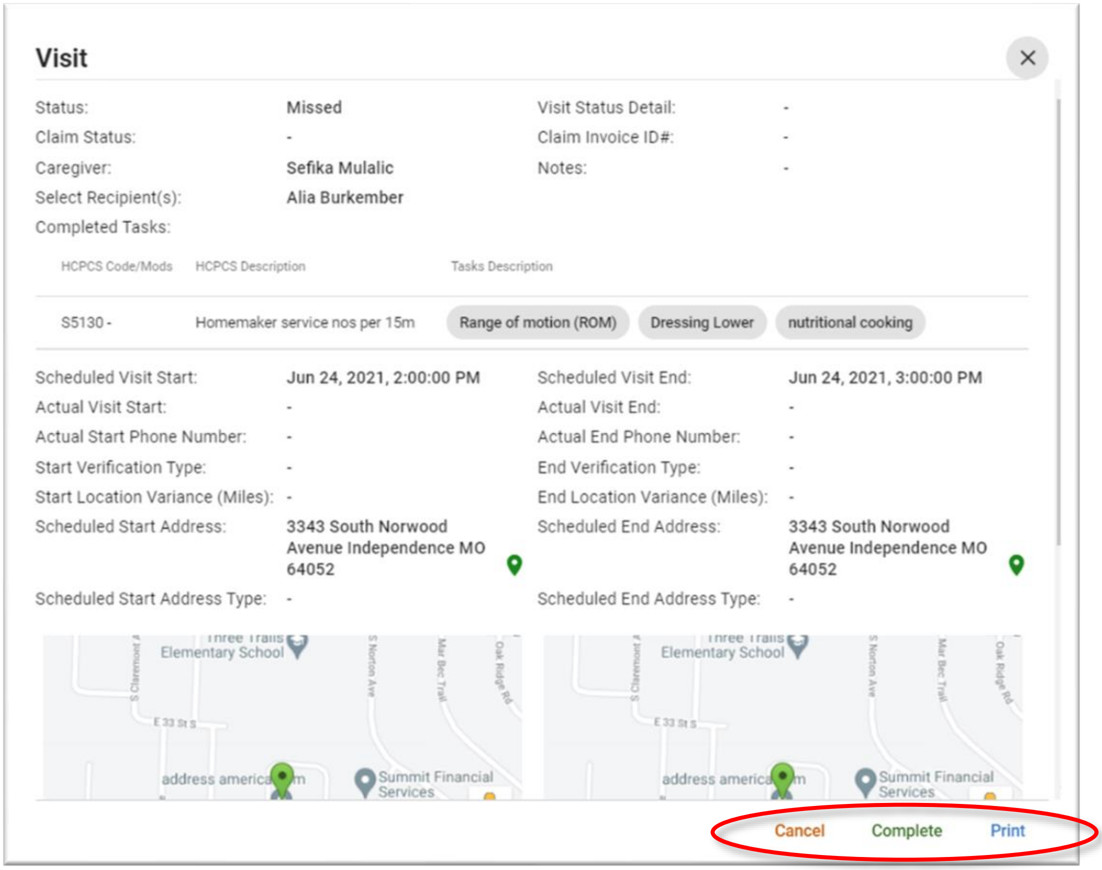
Users can print visit details for a visit of any status.

To print a visit's details:

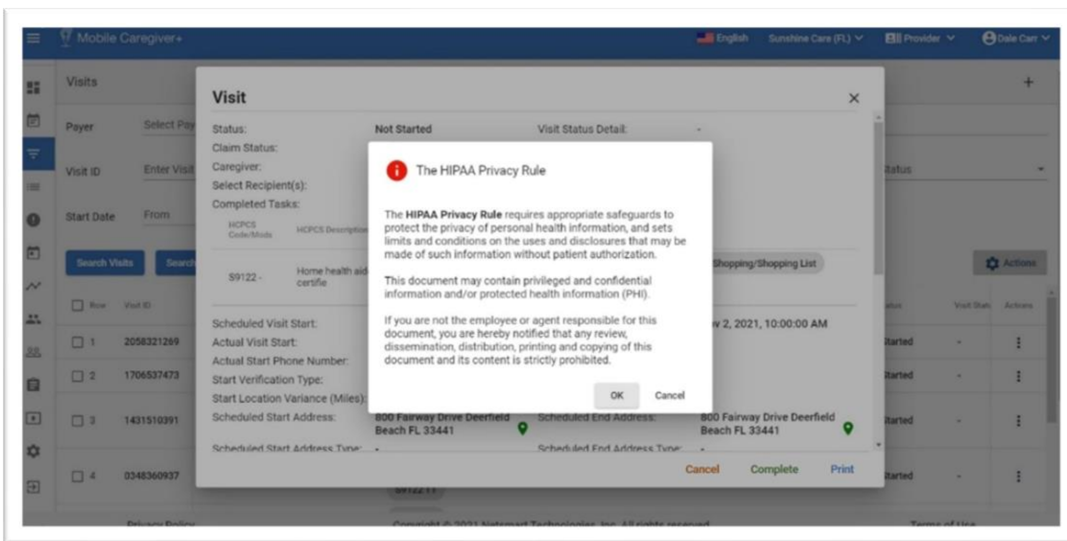
1. From the Main Menu, click **Visits**.



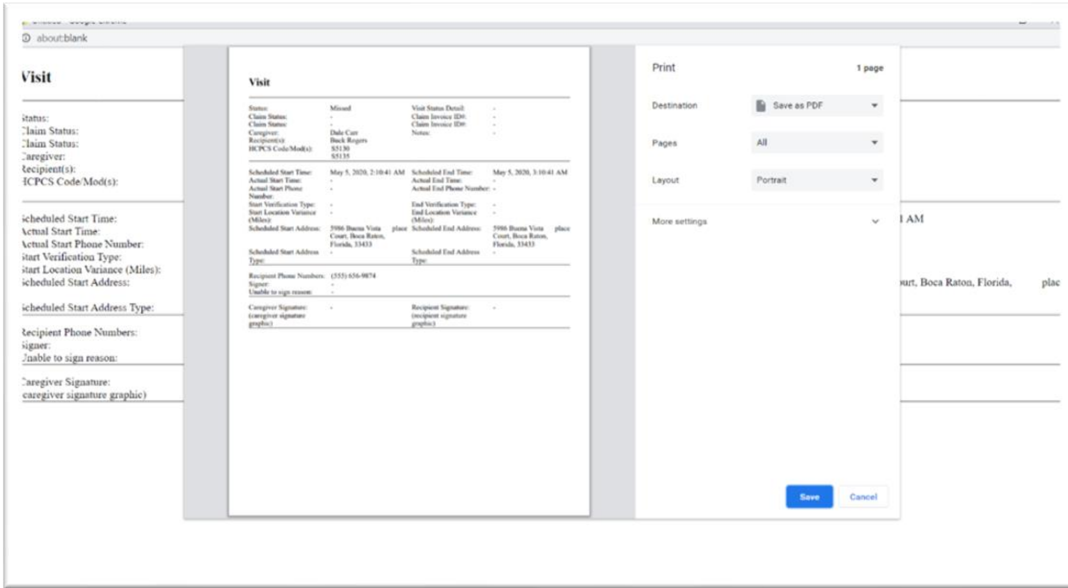
2. Locate the visit you want to view details for and click on the **Actions** icon, ⋮.
3. From the shortcut submenu, click **View Details** The system will display the Visit Status Details screen.



4. Click **Print**.



5. Review, then click **OK** to clear the HIPAA privacy notification.



6. Click in the print **Destination**, **Pages,** and **Layout** fields to configure any other optional settings.
7. Click the **Print** command (or **Save** to generate a PDF file) to print/save the visit details.

Related topics:

- *Adding/Scheduling Visits*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Updating a Visit*
- *Deleting a Visit*

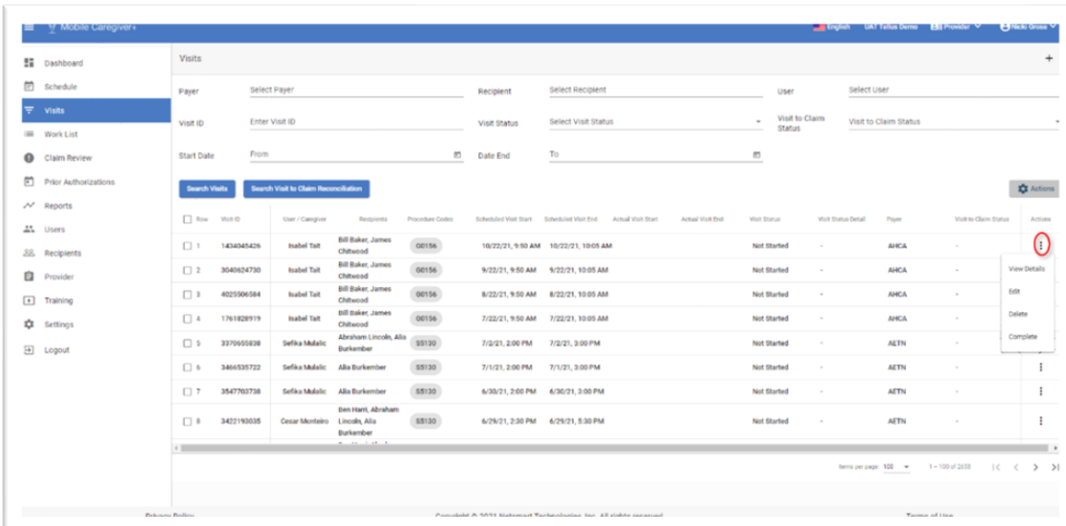
Deleting a Visit

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Visits* > Deleting a Visit

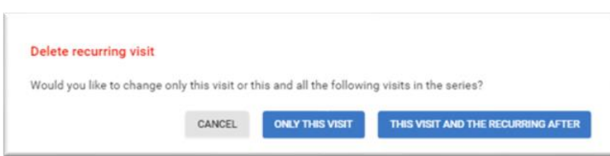
Users can only delete visit that have a **Not Started** status (future visits).

To delete a visit:

1. From the Main Menu, click **Visits**.



2. Find the visit you want to delete.
3. Click the **Action** icon, ⋮, for the visit you want to delete
4. From the shortcut submenu, click **Delete.** The system will automatically delete non-recurring visits.
5. For recurring visits, the system will display the Delete recurring visit dialog box.



6. Click **ONLY THIS VISIT** to delete the single visit that was selected.
7. Click the **THIS VISIT AND THE RECURRING AFTER** to delete the selected visit and all recurring visit scheduled afterward.

Related topics:

- *Adding/Scheduling Visits*
- *Searching for and Viewing Visits*
- *Viewing Visit Details*
- *Completing a Visit*
- *Canceling a Missed or Late Visit*
- *Updating a Visit*
- *Printing Visit Detail*

Managing Users

You are here: *Mobile Caregiver+ Provider Portal User Guide* > Managing Users

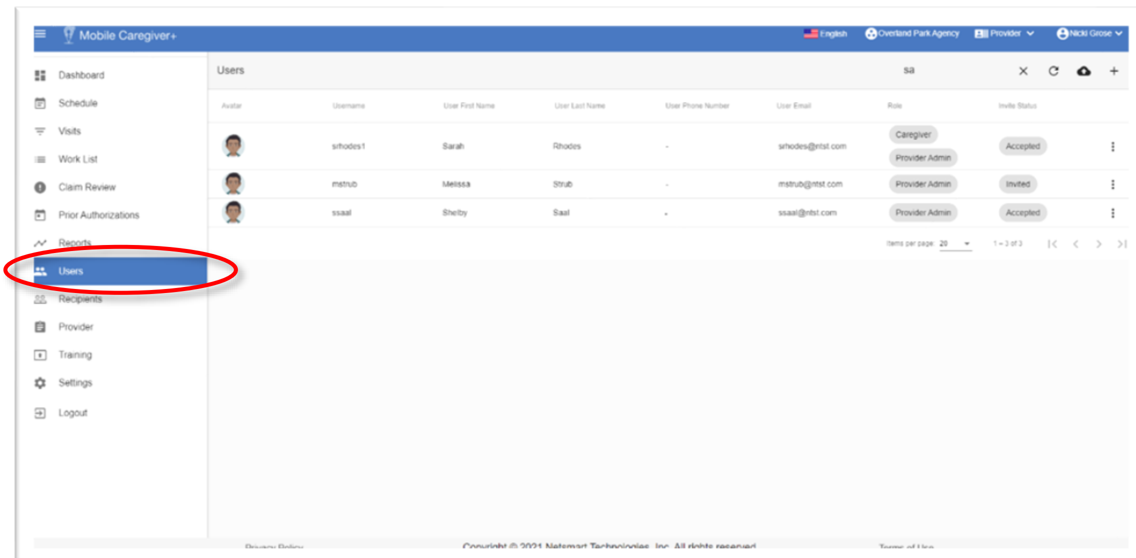
Click a topic below:

Viewing Users

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > *Viewing Users* > Viewing Users

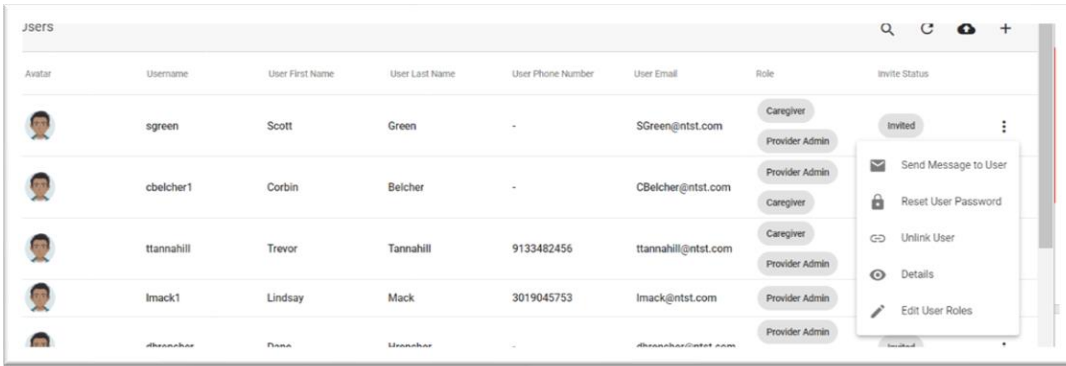
To view users:

1. From the Main Menu, click the **Users** to open Users screen.



2. The **Users List** will display the following information for all Users.
   - Profile picture.
   - Username.
   - First name.
   - Last name.
   - Phone.
   - Email.
   - Role.
   - Invite Status.
   - An Action icon that offers shortcut menu options for User management:
     - Send message to User.(Used to send HIPAA complaint messages to Caregivers).

- [Reset User password](#).
- [Unlink User](#) (Unlinks User from the current agency and reassign their tasks).
- Details ([view](#) or [update](#) User profile details).
- [Edit User Roles.](#)

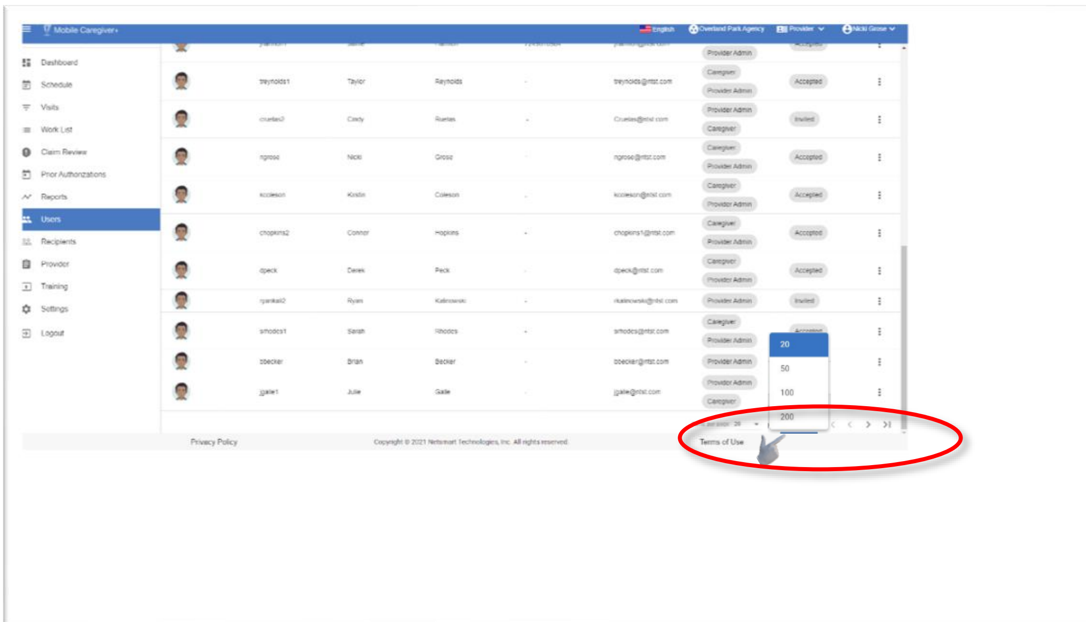


Changing the Number of Users Displayed per Page

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > *Viewing Users* > Changing the Number of Users Displayed per Page

To change the number of Users that appear on each page:

1. From the Main Menu, click **Users**.



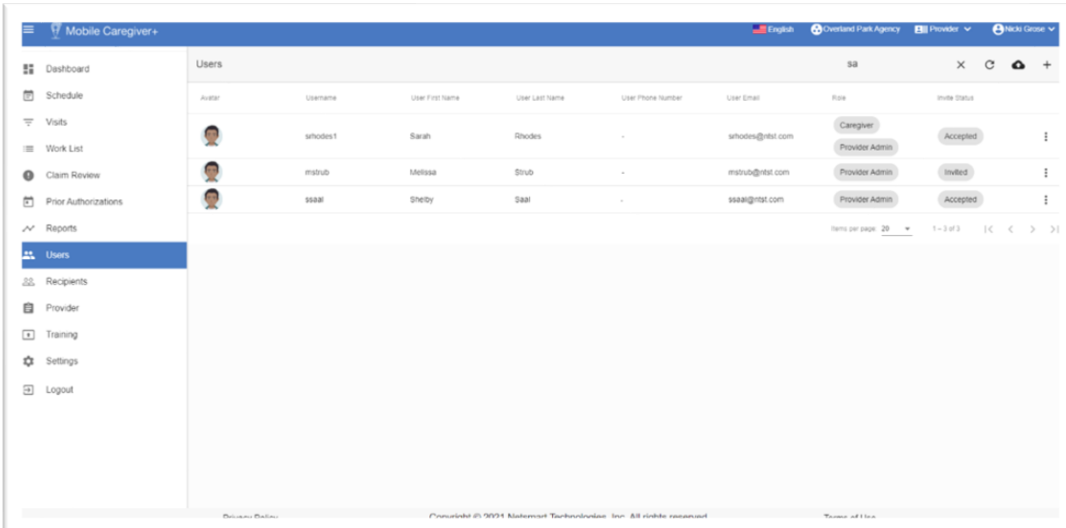
2. Scroll to the bottom of the page.
3. Click the **Items per page** dropdown arrow and select**:** 20, 50, 100 or 200 Users per page. The Users as well as the counter at the bottom of your screen are updated to reflect the range of records presented (for example, 1-20 of 74 records).
4. If there are too many Users to display on a single screen, then use the navigation icons, located at the bottom right corner of the screen, to scroll between pages.

Searching for a Specific User

You are here: [Mobile Caregiver+ Provider Portal User Guide](#) > [Managing Users](#) > [Viewing Users](#) > Searching for a Specific User

To search for a specific User:

1. From the Main Menu, click the **Users** option to view the Users page.



2. Click the magnifying glass icon, 🔍, located in top-right corner of the screen.
3. Enter all or part of a Username, first or last name, or all or part of an email address in the **Search User** field that displays and press the Enter key.
   The system will display all Users that have matching entries as the search text in their profile, i.e., as part of their Username, first name, last name, or email address will be displayed.

   Users can sort the list by clicking on any of the following column labels: Username, User First Name, User Last Name, Phone Number, or Email.
4. Click “X” to clear the search field and view all Users.

Related Topics:

- [Viewing Users](#)
- [Adding a New User](#)
- [Inviting an Existing User to your Agency](#)

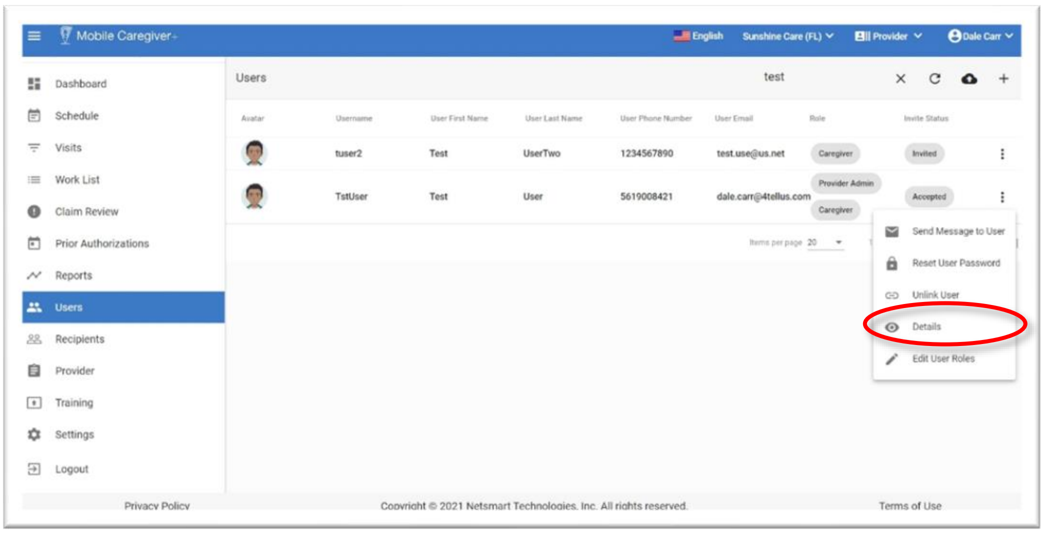
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Viewing User Profile Details

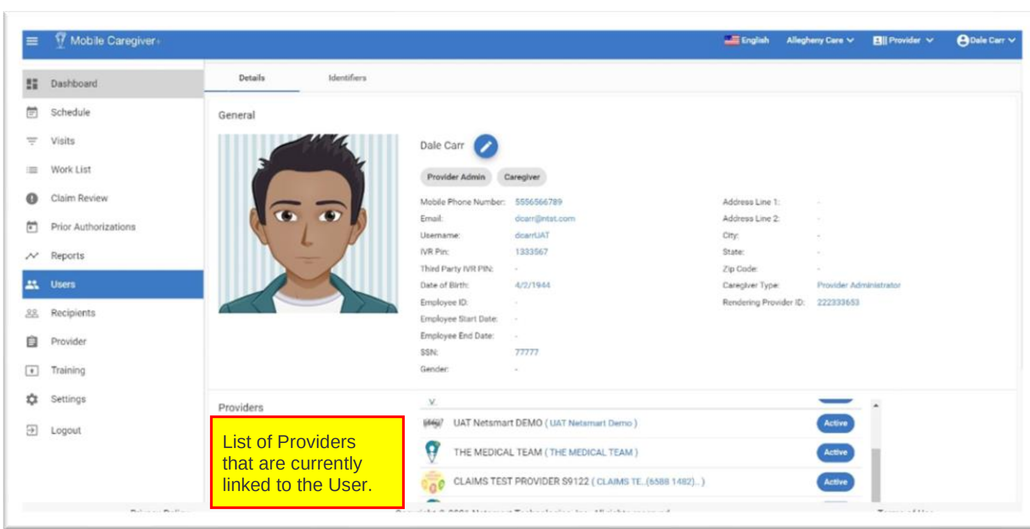
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Viewing User Profile Details

To view profile details for a specific User:

1. From the Main Menu**,** click **Users**.



2. Find the User whose detail/profile you want to view.
3. Click the **Action** icon, ⋮, located to the right of the User's record
4. From the shortcut submenu, click **Details**.



The **Details** tab of User Profile screen displays the following information for each User:

- Mobile Phone Number.
- Email Address.
- Username (this will be the ID that Users use to log in.
- IVR pin (Only User that have Payer approval will receive IVR Pins).
- Date of Birth
- Employee ID.
- Employee Start Date.
- Employee End Date
- SSN.
- Gender
- Address Line 1.
- Address Line 2
- City.
- State.
- Zip Code.
- Caregiver Type.
- Rendering Provider ID.
- Provider (Displays a list of Providers that are currently linked to the User).

Related Topics:

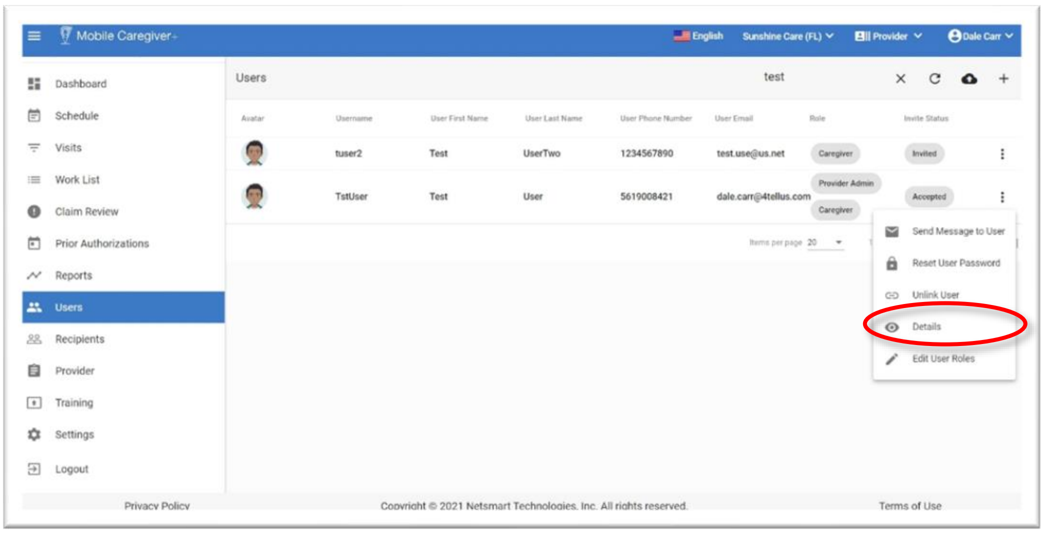
- *Viewing Users*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Viewing Provider Specific User Identifiers

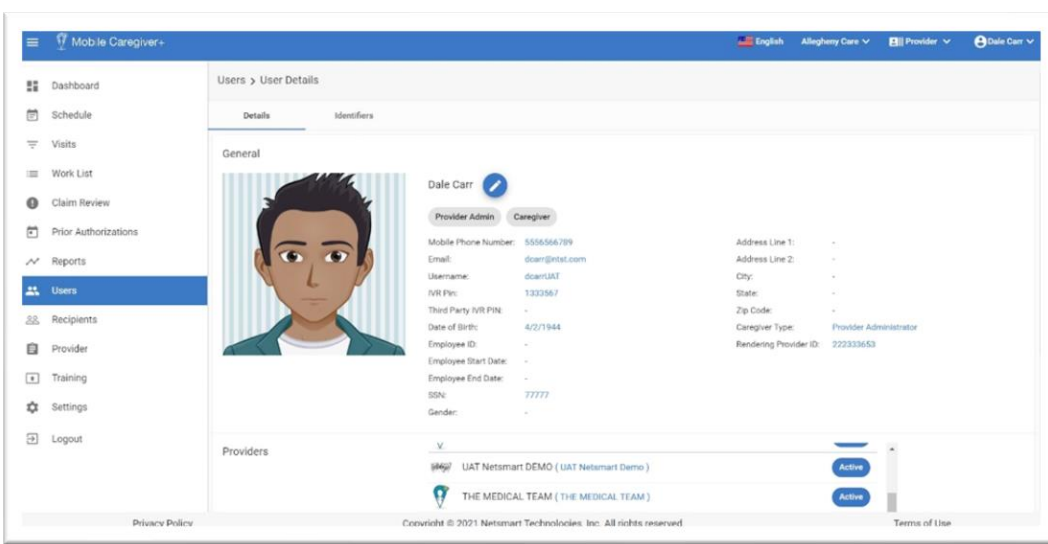
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Viewing User Provider Specific User Identifiers

To view profile details for a specific User:

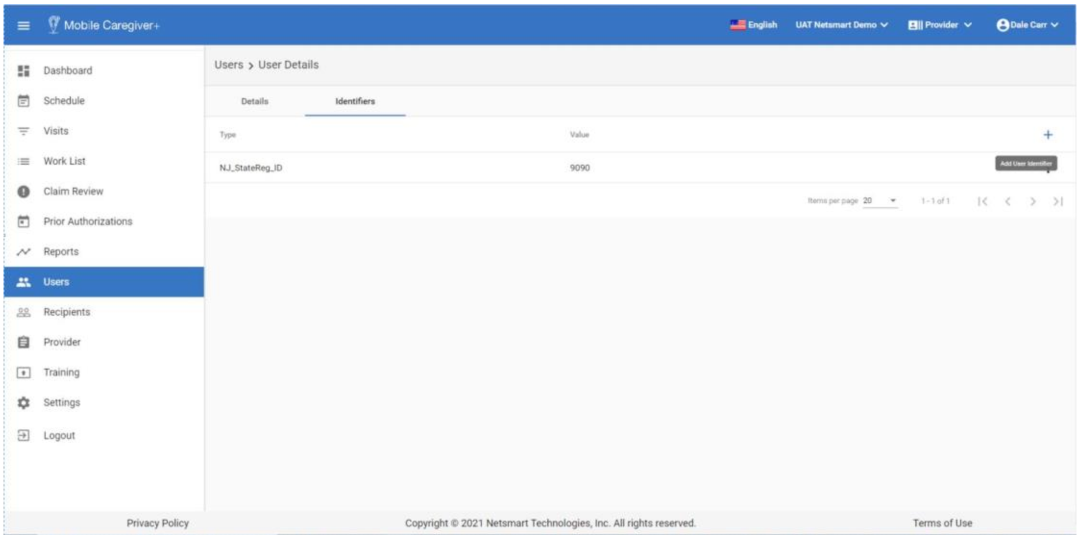
1. From the Main Menu**,** click **Users**.



2. Find the User whose detail/profile you want to view.
3. Click the **Action** icon, ⋮, located to the right of the User's record
4. From the shortcut submenu, click **Details**.



5. From the User Profile Details Screen, click on the **Identifiers** tab.



The Identifiers tab of User Profile screen displays the following information for each User:

- Type.
- Value.
- + (Add User Identifier).

Related Topics:

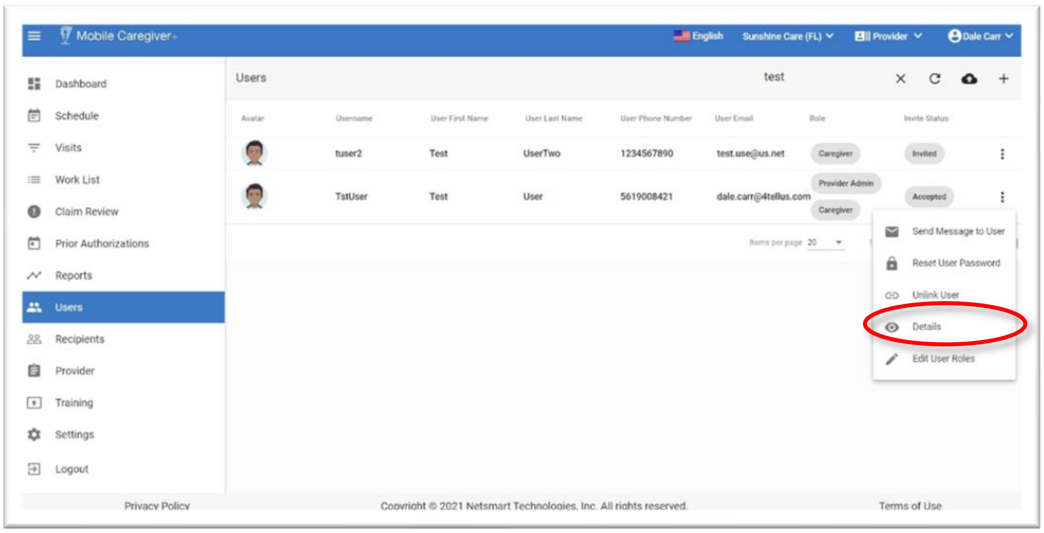
- *Viewing Users*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Editing User Profile Details

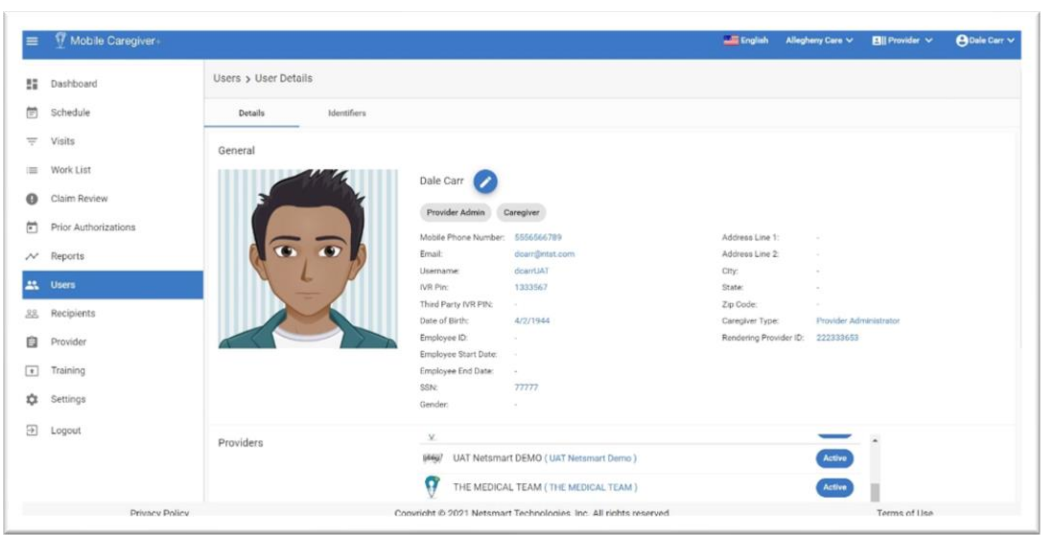
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Editing User Profile Details

To view profile details for a specific User:

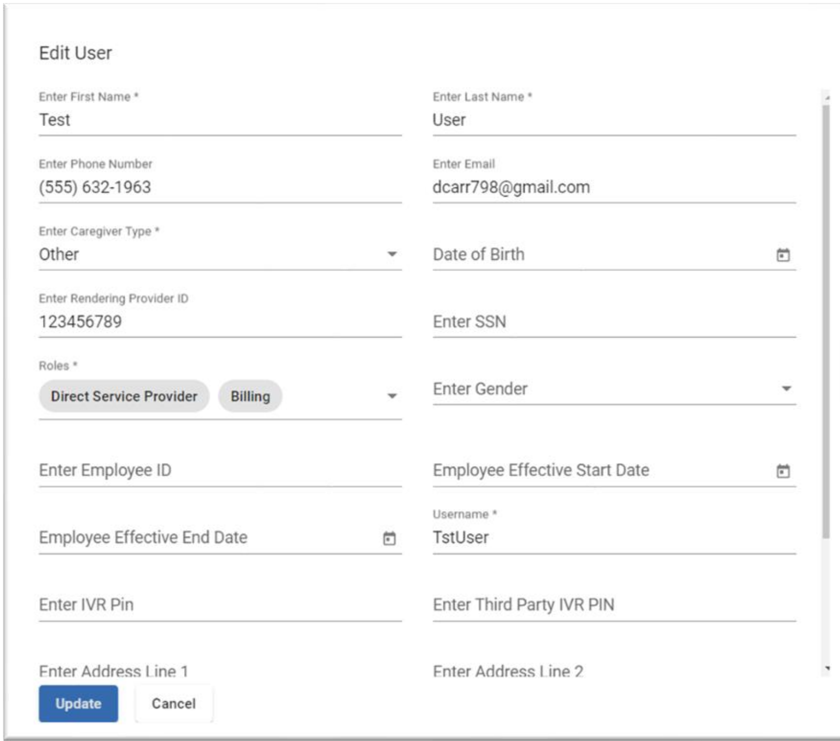
1. From the Main Menu**,** click **Users**.



2. Find the User whose detail/profile you want to view.
3. Click the **Action** icon, ⁝, located to the right of the User's record
4. From the shortcut submenu, click **Details**.



5. From the User Details screen, click the edit icon, , to update the User's profile, i.e., email address, phone number, etc.



6. Make all necessary changes.
7. Click the blue **Update** command to save the changes.

   Note: Provider Admins will not be able to edit all profile information for Users that are linked to multiple agencies. Users that are linked to multiple agencies may have to log in on the Mobile Caregiver+ application and edit their own profiles.

Related Topics:

- Viewing Users
- Adding a New User
- Inviting an Existing User to your Agency
- Importing a Group of New Users
- Sending a Message to a User
- Resetting User Passwords
- Unlinking Users from an Agency and Reassigning Tasks
- Updating User Detail
- Editing User Roles

Manually Adding New Users

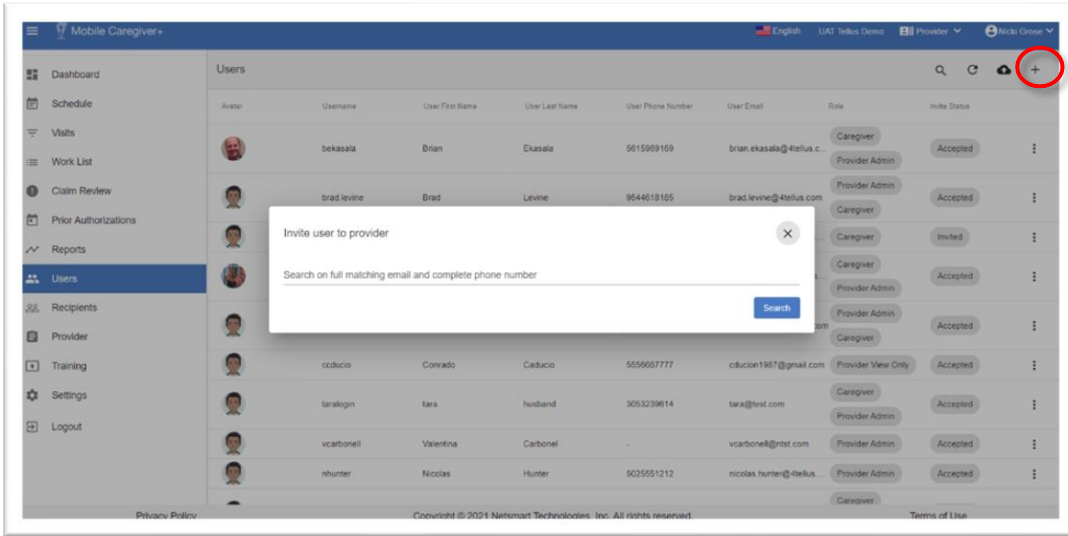
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Adding New Users

Warning: *Each User should only have one Mobile Caregiver+ User account. Users can work for more than one agency using a single account – Do not create new accounts for Users that have existing Mobile Caregiver+ accounts. Users with existing accounts can be invited to Link to other agencies.*
Note: Users can self-register for Mobile Caregiver+ User accounts using the Mobile Caregiver+ app. If a User self-registers, Provider Admins can invite the User to link to an agency; Provider Admins can manually add Users that have no existing Mobile Caregiver+ accounts.

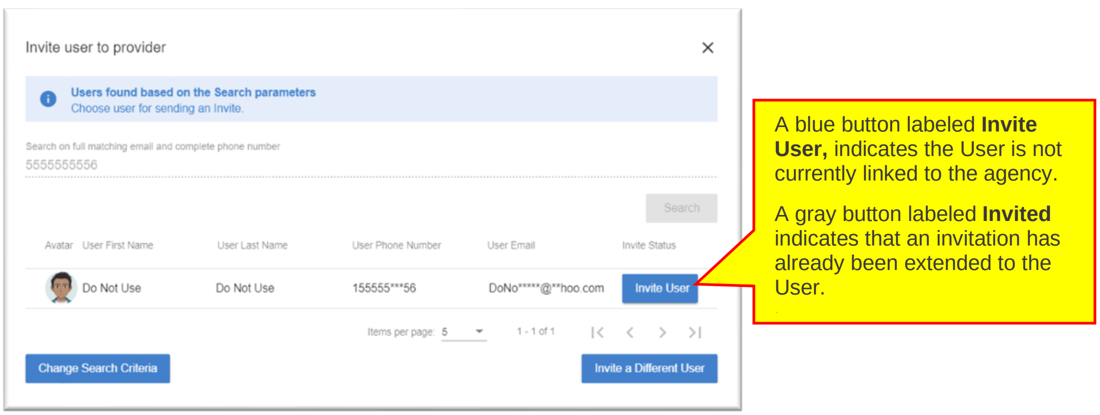
When a User is added to the Mobile Caregiver+ Portal, the system sends an email "inviting" the User to join the provider agency. Provider Admins can manually add, or link, Users and assign them one or more roles as Administrators, Caregivers, or Users who have view only privileges (they should be able to view, but not edit, information using the Provider Portal). Provider Admins have two options when adding/linking Users to an agency – Provider Admins can either manually add individual Users, or *import a group of Users* from a CSV file.

To manually add an individual User, follow the steps below:

1. From the Main Menu, click **Users**.



2. Click the **Add user to provider** command, +, to display the Invite user to provider dialog box.



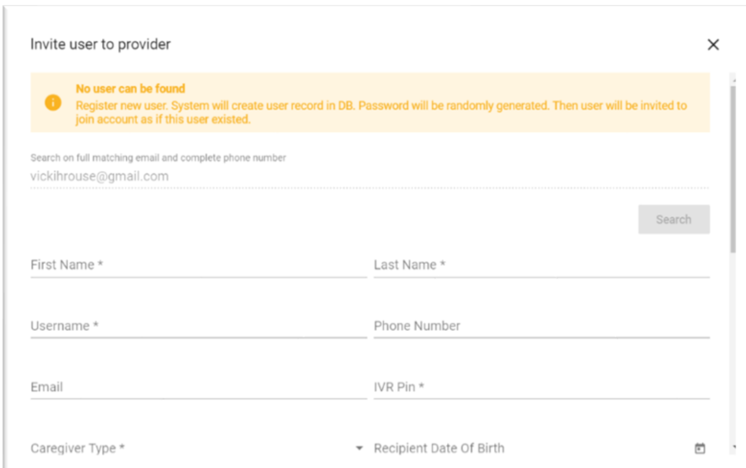
Providers are required to search for an existing User account, even if the User does not have an existing account, before adding a new user to an agency.

3. Enter the new User's email address or phone number.
4. Click the blue **Search** command.

The system will display a list of all existing Mobile Caregiver+ User Accounts that have a matching email address or phone number in their profiles. If there are no matching entries, the system will automatically display the Invite user to provider form (please refer to step 6).

Note: If there are matching entries, carefully review the list to determine if the User has an existing account. Do not create duplicate accounts (view the *instructions for [Inviting/Linking Users **with** an Existing User Account to an Agency]**)***

*If the User does not own any of the listed accounts, click the blue **Invite a Different User** command to create a new User account. The system will display the Invite user to provider dialog box.*



5. Fill in the User's information in the Invite user to provider form. Enter the following data elements:

- First name: (Required) Enter the new User's first name.
- Last name: (Required) Enter the new User's last name.
- Username: (Required) Enter the new User's preferred Username. This is the Username that will be used as the User's login ID.
- Mobile Phone Number (required if no Email address is entered): Enter the new User's phone number. This can also be used for notification and password reset purposes. Only numeric characters can be entered, i.e., 0-9. It is not necessary to add parentheses or hyphen; the phone number is formatted automatically as numbers are entered.
- Email (required if no Mobile Phone Number is entered): Enter the new User's valid email address. This can be used for notification and password reset purposes.

- IVR Pin: (Optional) The system will automatically generate a seven-digits numeric personal identification number.
- Caregiver Type: (Required) Click on the dropdown list arrow to see available types; Users can only be assigned one Caregiver Type.
- Date of Birth: (Optional) Enter the User's date of birth.
- Rendering Provider ID: (Optional) Normally Caregivers such as Home Health Aides and Personal Assistant do not have an NPI number; enter the NPI number if the Caregiver does have one.
- SSN: (Optional) Enter the Caregiver's nine-digits Social Security number.
- Roles: (Required) Click on the dropdown list to view and to select one or more of the following User roles:

User Role	Description: Rights and Permissions
Provider Admin	Users that are assigned the role of **Provider *Admin*** will have access rights to all billing provider features and functions of their agency's Mobile Caregiver+ Provider Portal. Provider *Admin* Users can manage all Users and objects, including creating new Users, objects, and assigning Roles. Provider Admin Users must also be assigned the *Caregiver* role in order for an Admin User to be able to do visits. *** Users that are assigned the role of **Provider *Admins*** will have access to all PHI data in a provider's agency. ***
Billing	Users that are assigned the role of ***Billing*** will have limited access rights to claims functions and features, i.e., to view Visits, Work List items, Claim Review items, Prior Authorizations, and to process claims.
Caregiver	Users that are assigned the role of ***Caregiver*** will have access rights to log in to the Mobile Caregiver+ app and complete visits (record rendered services).

User Role	Description: Rights and Permissions
	Caregivers will only have access to PHI data for Recipients that have been assigned to them – To assign a Recipient to a Caregiver, a Provider Admins must schedule an initial visit with the Recipient and the Caregiver from the Provider Portal.

*Note**:** A User's assigned role will determine which features and functions the User will be able to access. Multiple User roles can be assigned to a single account.*

6. Click the blue **Invite New User** command to save the account and send an invitation to the new User.

   The User's information will be saved, and the system will return to the Users page.

   An email will be sent to the User to activate their account. The user will have 36 hours to activate the invitation before it expires; to resend an invitation for one that has expired, Provider Admins can reset the User's passwords.

   Click the Cancel button to discard all entries and exit the Invite user to provider form. The new User information will not be saved.

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

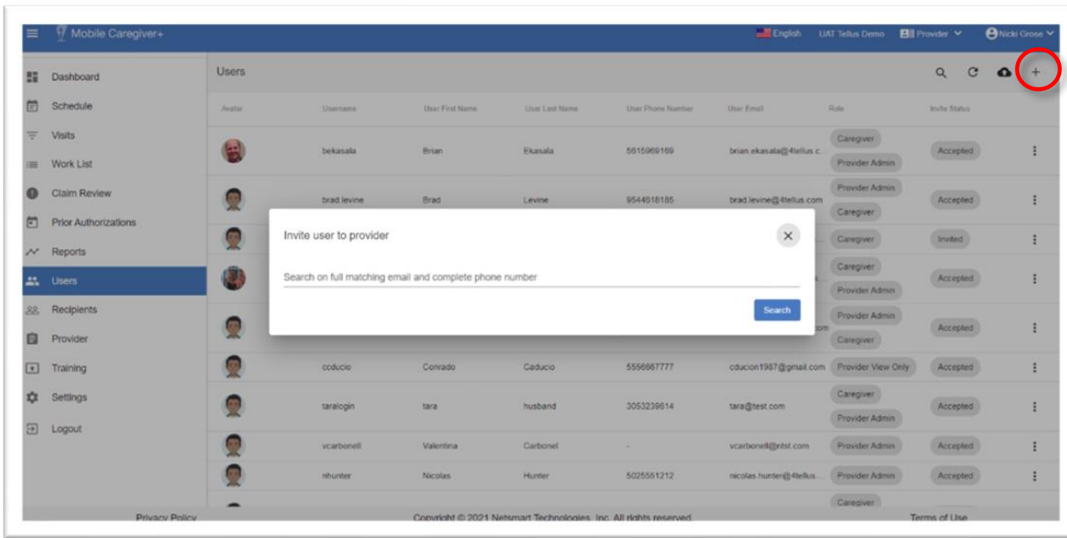
Inviting/Linking Users with Existing User Accounts to an Agency

You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Managing Users* > Inviting/Linking Users with an Existing User Account to an agency

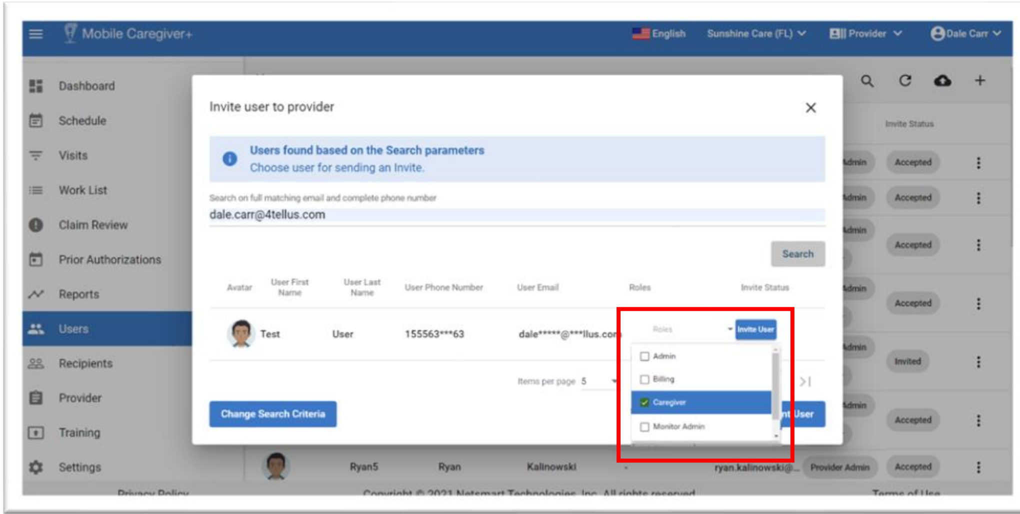
Note: Users can self-register and create their own User accounts using the Mobile Caregiver+ app. Users should only have one Mobile Caregiver+ User account – A single account can be linked to multiple agencies. Provider Admins can link/add Users with existing accounts by following the instructions below:

To invite/link existing Mobile Caregiver+ User accounts to other agencies, follow the instructions below.

1. From the Main Menu, click **Users**.



2. Click the "**Add User**" icon (+) in the upper right corner of the screen to open the Invite user to provider dialog box.
3. Enter the User's email address or phone number in the **Search on full matching email and complete phone number** field.
4. Click the blue **Search** command.
   The system will search for and display all existing User accounts with a matching phone number or email address in the user profile.



5. Click in the **Role** field for the user you want to invite to your agency.
6. Choose the user role by clicking on the drop-down list arrow in the **Roles** field.
7. Select the role(s) you want to assign to the user. Users can be assigned one or more roles.
8. Click the blue **Invite User** to link the User to your agency.
   Note: An email will be sent to the User to join your agency. The user will have 36 hours to accept the invitation before it expires.

Related Topics:

- *Viewing Users*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Editing User Roles*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Details*

Importing a Group of New Users

The Mobile Caregiver+ Solution allows you to upload User (Caregivers) and Recipient information, details as follows.

Note: If you have a smaller number of Users, then you may wish to simply enter them using the screens provided in the EVV Provider Portal.   If you have a larger number of each, then you may wish to use file upload. You only need to upload users who will be overseeing EVV needs for your organization. Users may include administrative staff, scheduling, billing, and the field staff performing EVV visits.

The template that we provide is in comma-separated-value (CSV) format, you can edit it with either Microsoft Excel, Google Sheets, or a notepad application. It is important that you follow the instructions below carefully, and that you do not change any of the fields/columns in the template.

Please contact Netsmart Client Support to obtain a copy of the EVVUsersUploadTemplate.csv file. Each column in the CSV file has specific rules about what is an acceptable entry, the rules are explained in more detail below.

Warning: Each User should only have one Mobile Caregiver+ User account; Users can work for more than one agency using a single account – Do not create/upload new accounts for Users that have existing Mobile Caregiver+ accounts. Users with existing accounts can be invited to Link to other agencies.

Completing the New User Spreadsheet

You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Managing Users* > *Importing a Group of New Users* > Completing the New User Spreadsheet

Remember, when you edit this template in Excel or Google Sheets, you must save the file as **.csv** file before uploading.

To import User accounts:

1. Contact Netsmart Client Support to obtain a copy of the “EVVUsersUploadTemplate.csv” file, along with an instructional PDF file.
2. Read the instructions contained in the PDF file.
3. Enter the Users into the CSV template.

COLUMN A – USERS FIRST NAME

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- FirstName is a mandatory field
- FirstName allows for letters and spaces only (no numbers or special characters)
- FirstName can be up to 255 characters in length or less

COLUMN B – USERS LAST NAME

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						

- LastName is a mandatory field
- LastName allows for letters and spaces only (no numbers or special characters)
- LastName can be up to 255 characters in length or less

COLUMN C – USERNAME

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- UserName is a mandatory field
- UserName allows for letters, numbers, and special characters
- UserName can be up to 255 characters in length or less

COLUMN D – EMAIL

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- Email is a conditional field. Either Email or Phone Number must be populated.
- Email must have an "@" and "."
- Email can be up to 255 characters in length or less
- Example: Johndoe12!@gmail.com

COLUMN E – PHONENUMBER

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- Phone Number is a conditional field. Either Email or Phone Number must be populated.
- Phone Number must contain only numbers
- Phone Number must be 10 numeric characters in length

COLUMN F – Users IvrPin

	A	B	C	D	E	F
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111
3						
4						

- IvrPin is an optional field.
- IvrPin allows for numbers only, (no spaces, or special characters)
- IvrPin must be seven (7) numeric characters in length

COLUMN G – Users MedicaidID

	A	B	C	D	E	F	G
1	FirstName	LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID
2	Jane	Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897
3							
4							

- MedicaidID is an optional field
- MedicaidID must be 9 - 13 digits in length, and allows for numbers and letters only, (no spaces, or special characters)
- There should not be any spaces BEFORE the MedicaidID number starts, for example: “123456789” is valid, and “123456789” is not valid because there is a space before the “1”
- If MedicaidID starts with zero, add letter “M” in front to keep leading Zero. Some applications remove zero after saving as .CSV, our application will remove letter “M” after import is successful.

COLUMN H – UserRole

B	C	D	E	F	G	H
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole
Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE

- UserRole is mandatory
- UserRole may only contain the specific 4 letter code for the following:
  - PRAD (Provider Administrator)
  - CARE (Caregiver) *note mobile login only
  - PMON (Provider Monitor) *note Admin permission with read only access

COLUMN I – UserStatus

B	C	D	E	F	G	H	I
LastName	UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus
Doe	Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	ACTIVE

- UserStatus is a mandatory field
- UserStatus may **only** contain one of the following specific values:
  - ACTIVE (Can log in)
  - INACTIVE (Not allowed to log in)

<u>COLUMN J – CaregiverType</u>

C	D	E	F	G	H	I	J
UserName	Email	PhoneNumber	IvrPin	MedicaidID	UserRole	UserStatus	CaregiverType
Jane12	JaneDoe12@gmail.com	5555555555	1111111	M3412234560897	CARE	ACTIVE	RNS

- CaregiverType is a mandatory field
- CaregiverType may **<u>only</u>** contain one of the following specific 3-4 letter codes:
  - CNA (Certified Nursing Assistant)
  - LPN (Licensed Practical Nurse)
  - RNS (Registered Nurse)
  - ABA (Assistant Behavior Analyst)
  - RBT (Registered Behavior Technician)
  - LA (Lead Analyst)
  - OTHR (Other)

4. Make sure you have deleted the sample row from the Users list you just finished creating
5. Make sure you have saved the document as a .csv file

Related Topics:

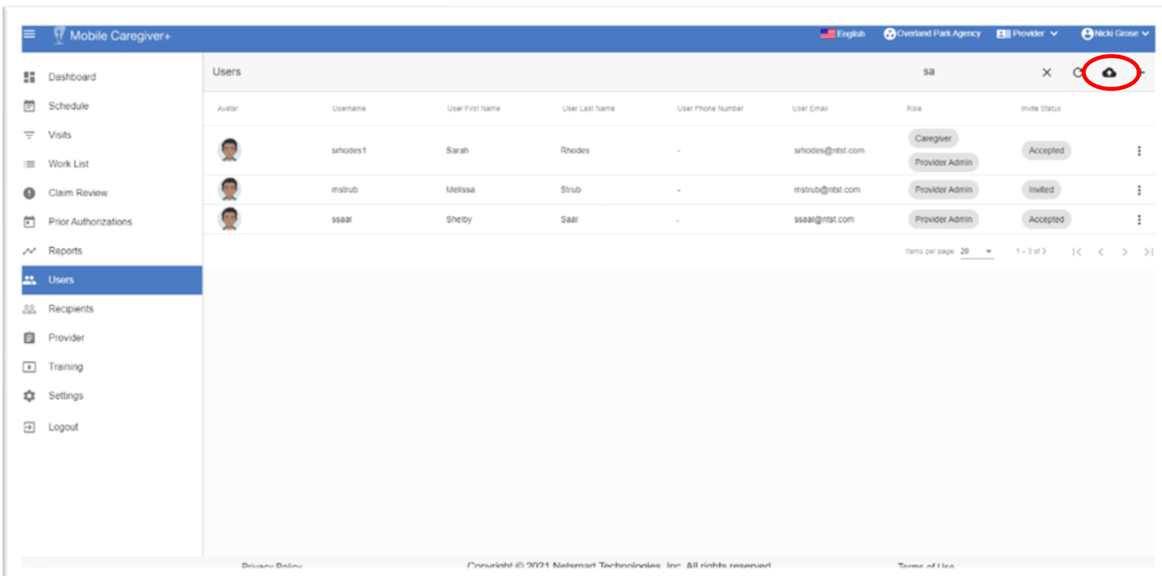
- *Viewing Users*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Editing User Roles*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Details*

Importing From the CSV Template

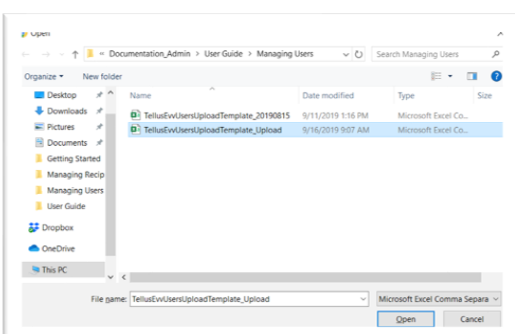
You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Managing Users* > *Importing a Group of New Users* > Importing the New User Spreadsheet

Now that you have entered the information for your Users into the template, you are ready to load your Users into the Mobile Caregiver+ Provider Portal by following the below steps:

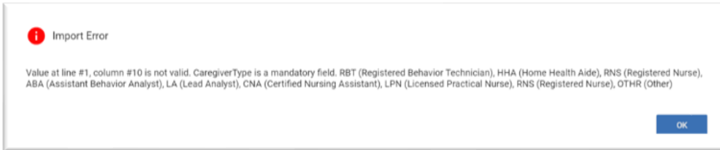
1. From the Main Menu, click **Users**.



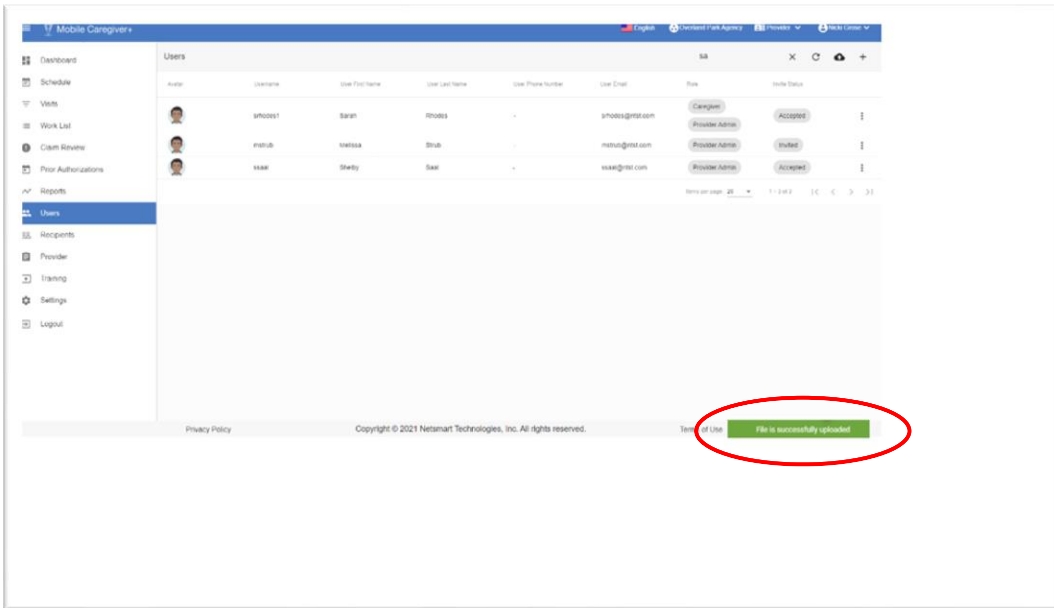
2. Click the **Import users from CSV-file** icon, , located in the top right corner of the screen. The system will display the Open File Explorer dialog box.



3. Locate and click on the CSV file you want to upload.
4. Click **Open**.



If the import is successful, a green File successfully uploaded message will display in the lower right corner of the screen.



If any errors are identified, a message containing the exact row(s) and column(s) of the error will be shown on your screen.

Please refer to the guide above to troubleshoot the exact error(s)

Note: If there are any errors detected by the system, no records from your file will upload, the entire file must be error free before any User records will upload.

Related Topics:

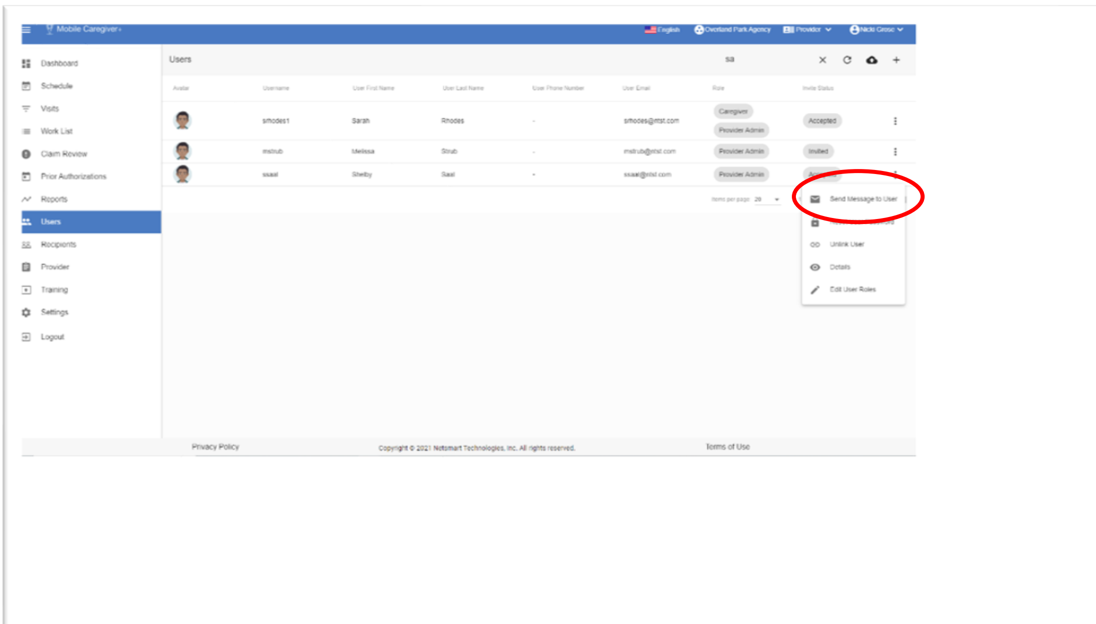
- *Viewing Users*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Editing User Roles*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Details*

Sending a Message to a User

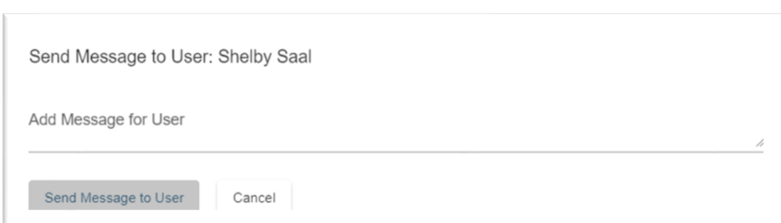
You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Managing Users* > Sending a Message to a User

The Netsmart EVV Solution allows providers to send HIPAA compliant text message to Users. Follow the directions below to send text message to Users:

1. From the Main Menu, click **Users**.



2. Find the User you want to send the message to, then click **Actions** icon, ⋮, located on the right side of the User's record.
3. From the short-cut submenu, click **Send Message to User**.



4. Type the text message to be sent in the **Add Message for User** field; at least one character must be entered to enable the Send Message to User command.
5. Click the **Send Message to User** command to send the message.

If you click Cancel on the Send Message to User page, the system will return to the Users page and the message will not be sent.

Note: Users assigned the role Caregiver, will receive messages on their Mobile Caregiver+ app.

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

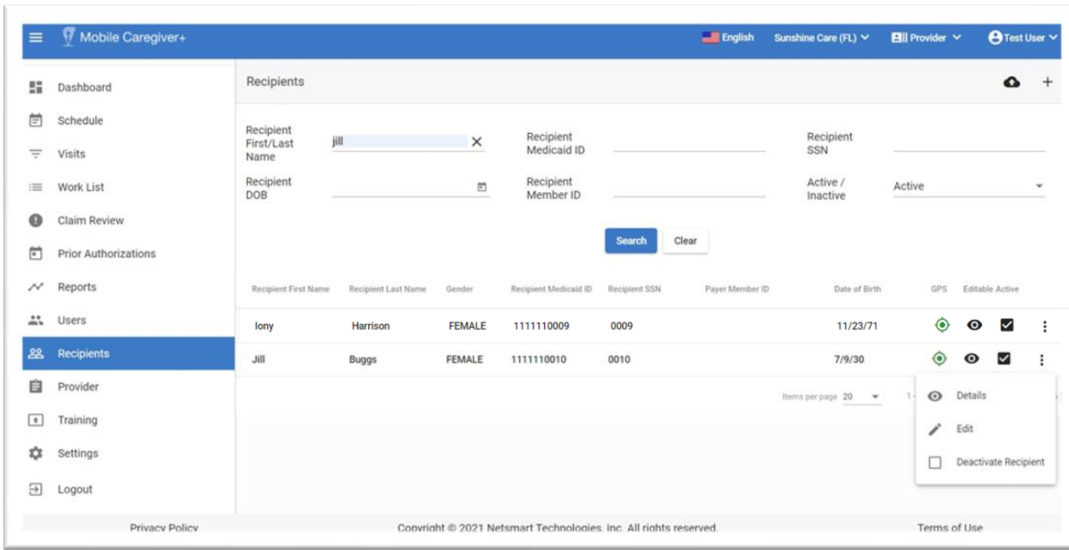
Messaging Users from the Recipient Linked Users Tab

You are here: *Mobile Caregiver+ Provider Portal User Guide User Guide* > *Managing Users* > Messaging Caregivers from the Linked Users Tab

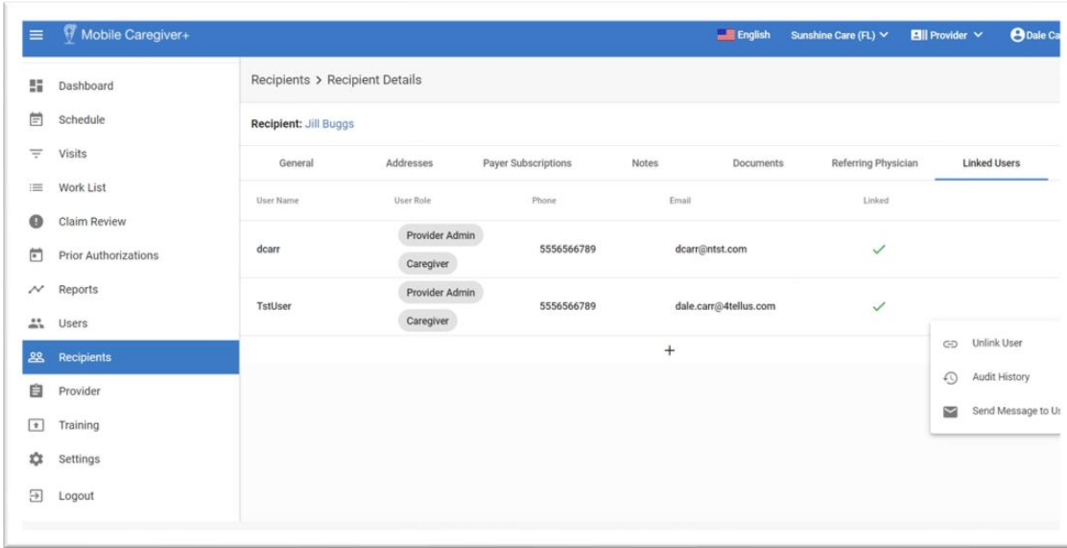
The Mobile Caregiver+ Provider portal allows Provider Admins to send HIPAA compliant messages to Caregivers from the Linked Users tab, located in a Recipient's profile.

Unicast – Texting a Linked Caregiver

1. From the Main Menu, click **Recipients**.



2. From the Recipients screen, locate and click on the **Actions** icon, ⋮, for a Recipient that is linked to the Caregiver you want to message.
3. From the shortcut submenu, click **Details**.

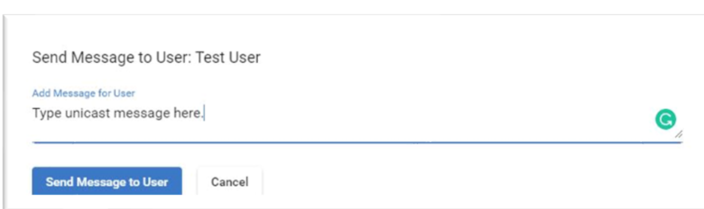


4. Click on the **Linked Users** tab.

   The system will display the Linked Users table with a list of all users that have been linked to the selected Recipient.

   - The Linked status field will display the Linked icon, ✓, if the Recipient has a current-active link to the user.
   - The Linked status field will display the Unlinked icon, ✕ , if the user is not currently, but was previously, linked to the selected **Recipient**.
   - Click the **Message** icon, ✉ , located in the top-right corner of the screen to send a message to one or more linked Caregiver(s).

5. From the Linked Users table, click the Actions icon, ⋮, located to the right of the Caregiver's record.
6. From the short-cut submenu, click **Send Message to User**. The system will display the **Send Message to User** dialogue box.



7. Type the text message to be sent in the **Add Message for User** field; at least one character must be entered to enable the **Send Message to User** command.

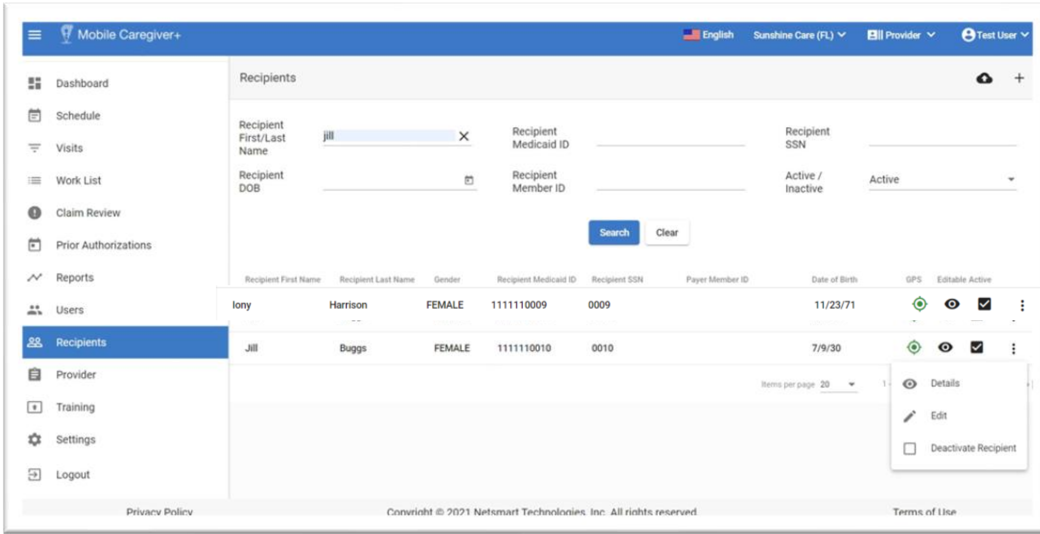
8. Click the blue **Send Message to User** command to send the message.

Related Topics:

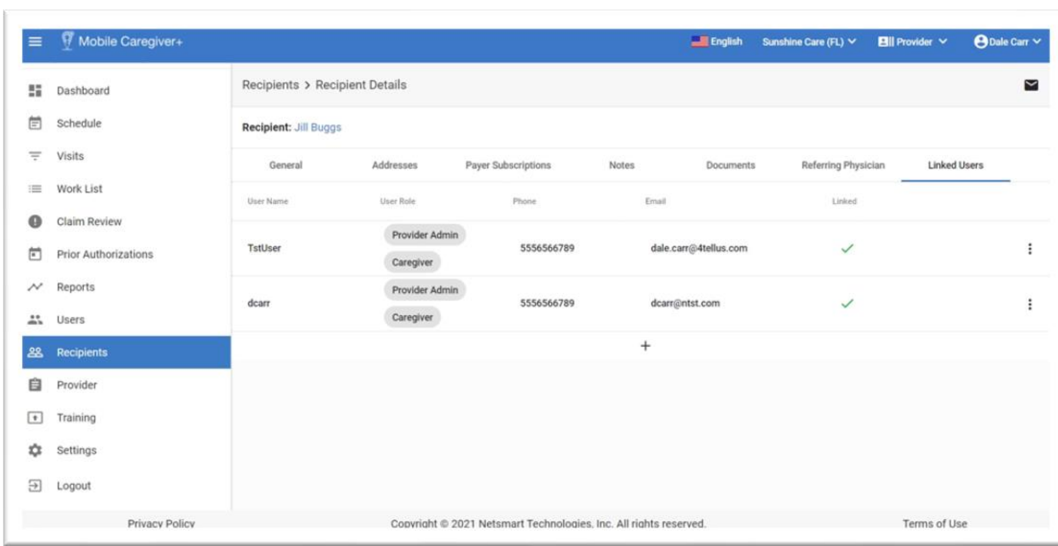
- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Multicast – Texting Multiple Linked Caregivers

1. From the Main Menu, click **Recipients**.



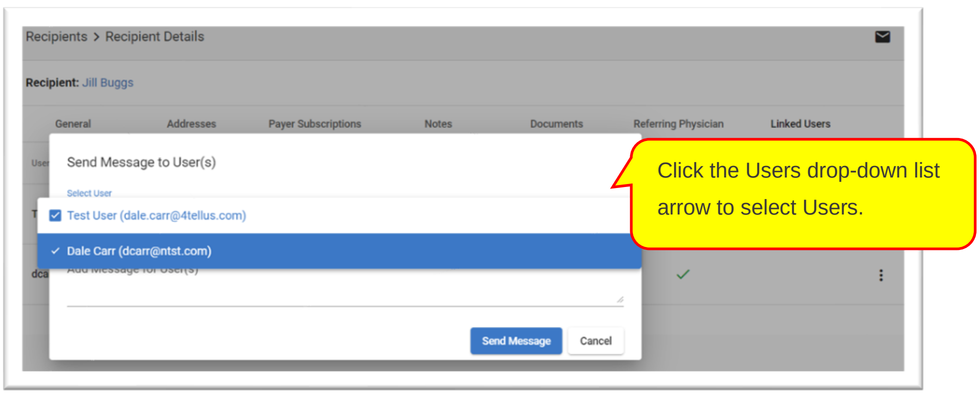
2. From the Recipients screen, locate and click on the **Actions icon**, ⋮, for a Recipient that is linked to the Caregiver you want to message.
3. From the shortcut submenu, click **Details**.



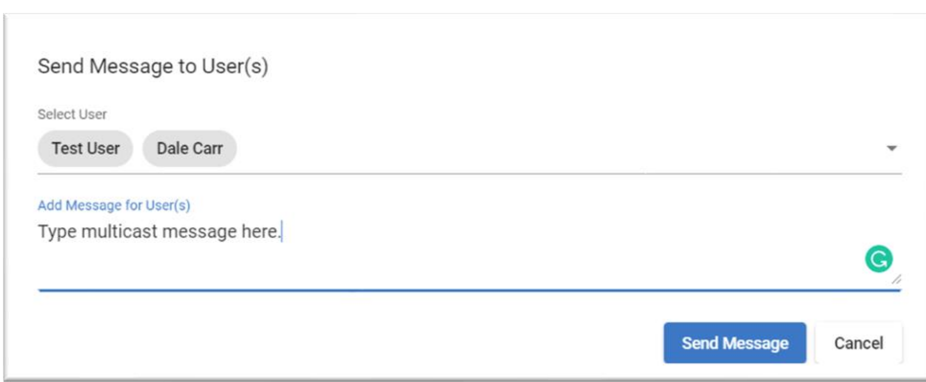
4. Click on the **Linked Users** tab.
5. The system will display the Linked Users table with a list of all users that have been linked to the selected Recipient.

- The Linked status field will display the Linked icon, ✓, if the Recipient has a current-active link to the user.
- The Linked status field will display the Unlinked icon, ×, indicating that the user is not currently, but was previously, linked to the selected Recipient.
- Click the **Message** icon, ✉, located in the top-right corner of the screen to send a message to one or more linked Caregiver(s) (please view *Texting Multiple Users*).

6. From the Linked User screen, click the **Message** icon, ✉, located top right corner of the screen.
7. The system will display the Send Message to User dialogue box.



8. Click in the **Select Users** filed to view and select one or more users that are linked to the Recipient. Users will be able to select multiple users, at least one user must be selected.



9. Type the text message to be sent in the **Add Message for User** field; at least one character must be entered to enable the Send Message command.

10. Click the blue **Send Message** command to send the message to the selected Caregiver(s).

Related Topics:

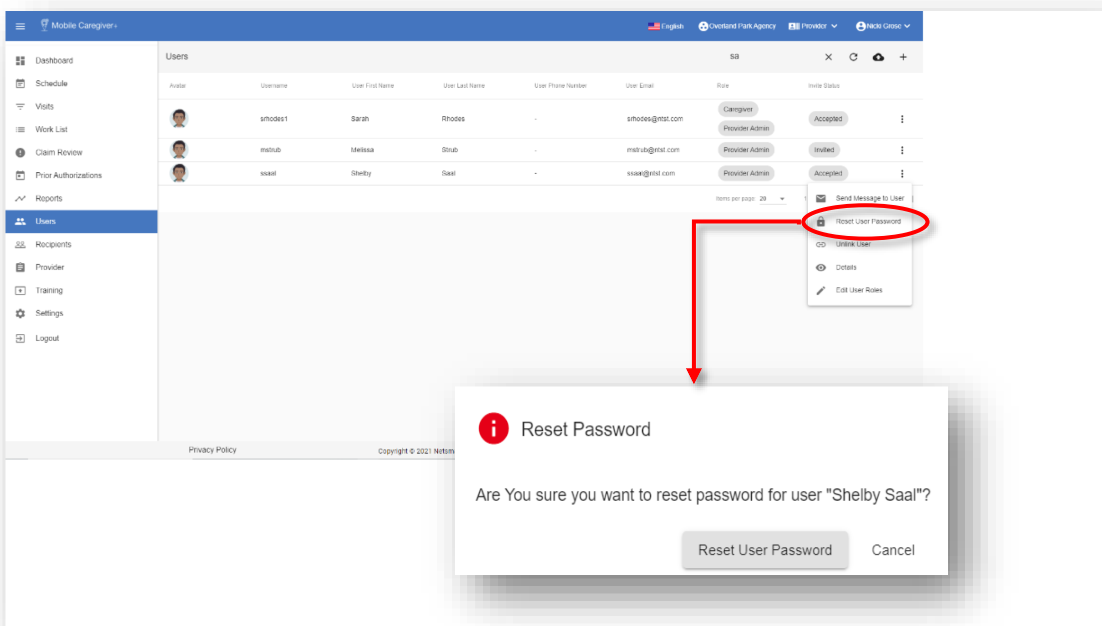
- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Resetting User Passwords

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Resetting User Passwords

To avoid passwords from being expired, Provider Administrators can proactively reset their own password, as well as reset any User's by following the steps below:

1. From the Main Menu, click **Users**.



2. Find the User whose password you want to reset.
3. Click the **Actions** icon, ⋮,located to the right of the User's record
4. From the short-cut submenu, click **Reset password**.

   The system will email a temporary password to the User. The next time the User attempts to log in, they will be prompted to change the temporary password. Click Cancel to the Reset Password dialog box; the system will return to the Users screen.

   *Warning: The temporary password will expire after **36** hours; Users must log in and change the password within **36** hours.*

Related Topics:

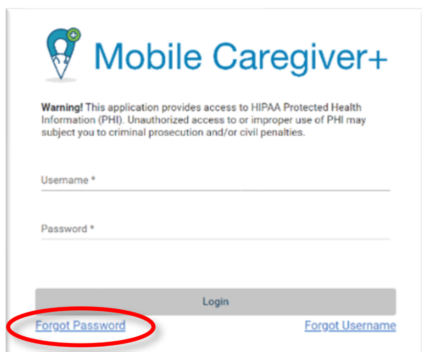
- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Resetting Forgotten Passwords

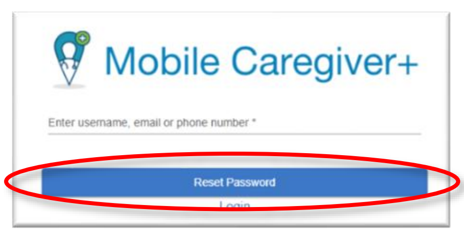
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Resetting Forgotten Passwords

If a user has forgotten his/her password, it can be reset from the Provider Portal Login screen:

1. From Mobile Caregiver+ login screen, click **Forgot password** link.



2. Enter your username, email, or phone number and click **Rest Password**.



Note: You will receive an email or a text message, depending on whether you entered your email address or phone number, with the subject line "Reset Your Mobile Caregiver+ Password." It will contain a temporary password that you can use to login; the system will prompt you to change your password. This link is valid for 36 hours; if you do not change your password within that time, you will need to reset your password again.

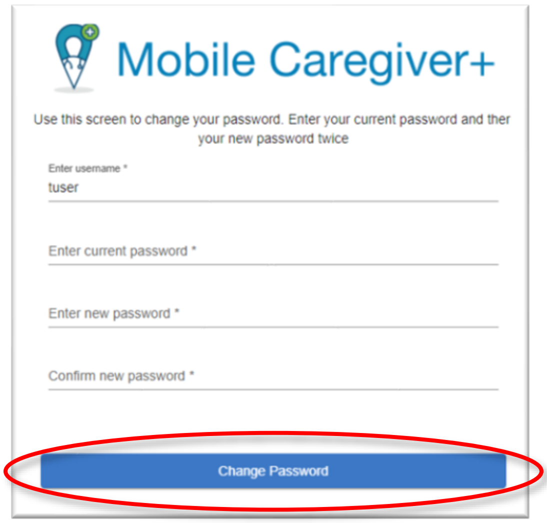
3. Go back to the login page and enter your username and temporary password.
4. You will be prompted to change the temporary password to a new password.
   i. Enter your username.

ii. Enter your temporary current password.

iii. Enter a new password.

iv. Confirm the new password by re-entering it.

v. Click ***Change Password*** to confirm your new password.



Note: You will have 36 hours to activate your account; after that time, the invitation expires.

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*
- *Editing User Roles*

Unlinking Users From an Agency and Reassigning Tasks

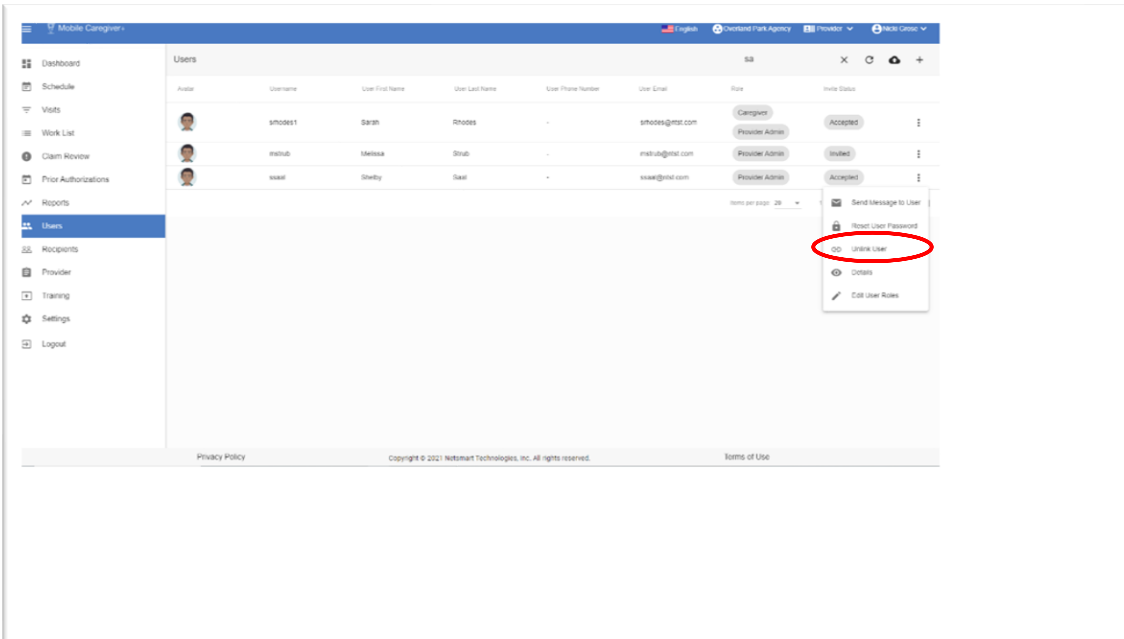
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Unlinking Users From an Agency and Reassigning Tasks

Unlinking a User from an agency revokes the User's access to the agency. providers should unlink all Users that are no longer a part of their agencies.

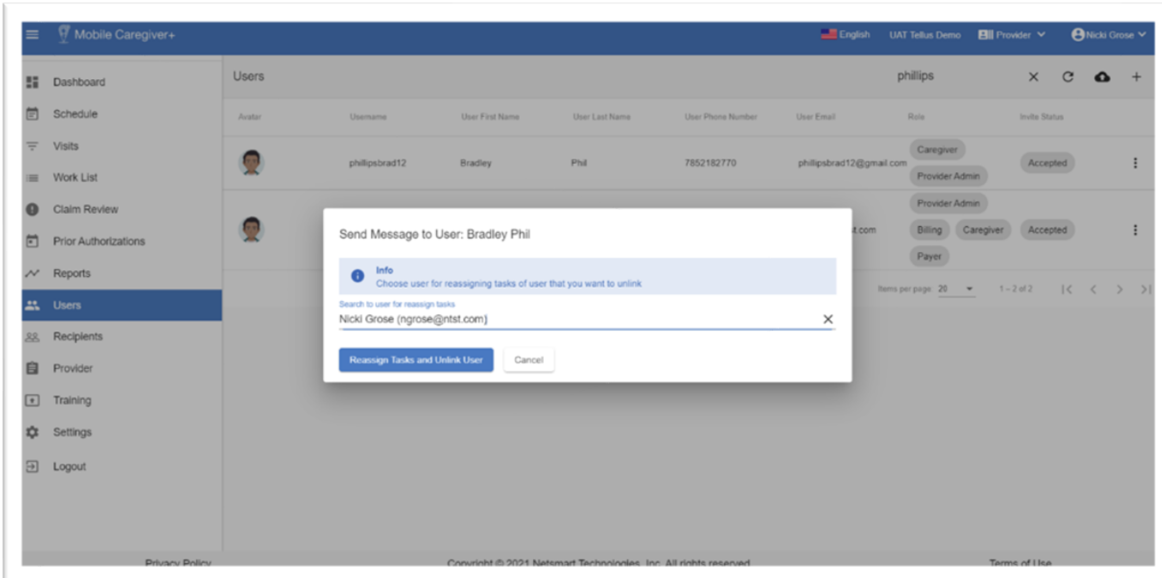
Note: Administrators cannot unlink themselves; Unlinking a User with the Admin role must be done by a different Administrator.

To unlink a User and reassign their tasks to another User:

1. From the Main Menu, click **Users**.



2. Find the User you want to unlink and click the **Actions** icon, ⋮,located to the right of the User's record
3. From the short-cut submenu, click **Unlink User**.



4. From the Send Message to User dialog box, start typing the Username or email address to find the User that the unlinked User’s tasks will be reassigned to.

   Note: Providers must enter a User to reassign the selected User’s tasks to; the system will reassign all scheduled visits to the selected User.

5. Click **Reassign Tasks and Unlink User**. That User will be unlinked from the agency.

   Click **Cancel** to exit without unlinking the User from the agency; the system will return to the Users screen.

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Updating User Detail*
- *Editing User Roles*

Updating User Profile Details

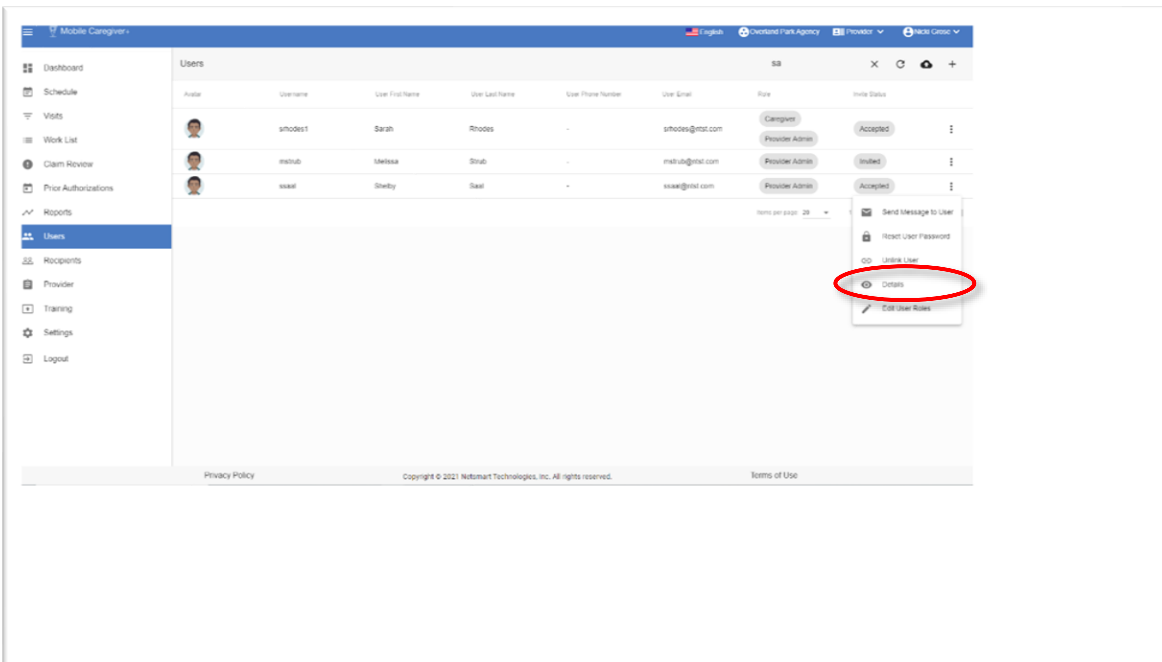
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Users* > Updating User Details

Provider Admins can update User's profiles from the Users screen.

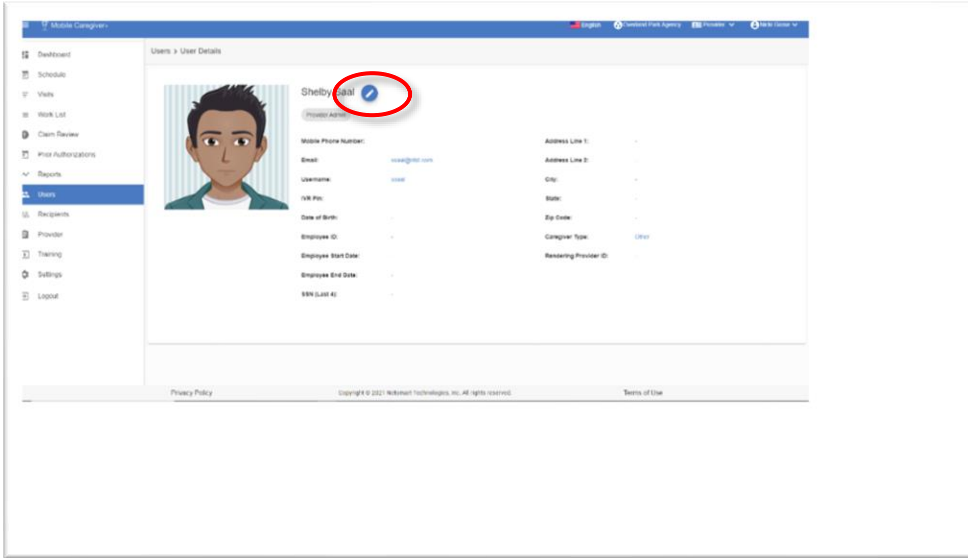
Note: Provider Admins do not have access to update profile details for Users that are linked to more than one agency; Users that are linked to more than one agency must update their own profile via the Mobile Caregiver+ application. The Profile option can be found on the Main Menu on the app.

The instructions below are for updating User profile details from the Provider Portal:

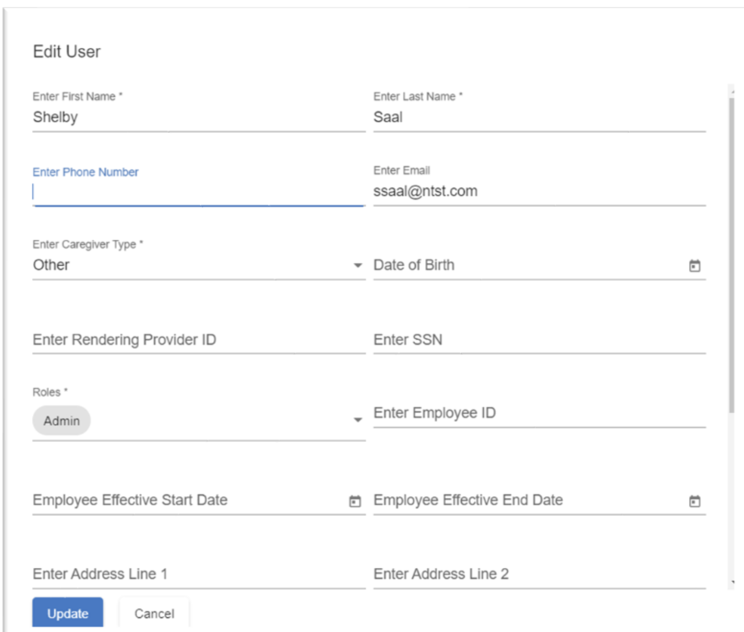
1. From the Main Menu, click **Users.**



2. Find the User whose profile you want to update, then click the **Actions** icon, ⋮, located to the right of the User's record
3. From the short-cut submenu, click **Details**.



4. From the User Details screen, click edit icon, .



5. Make any necessary changes to the User's profile.
6. Click the blue **Update** command to save any changes.

Related Topics:

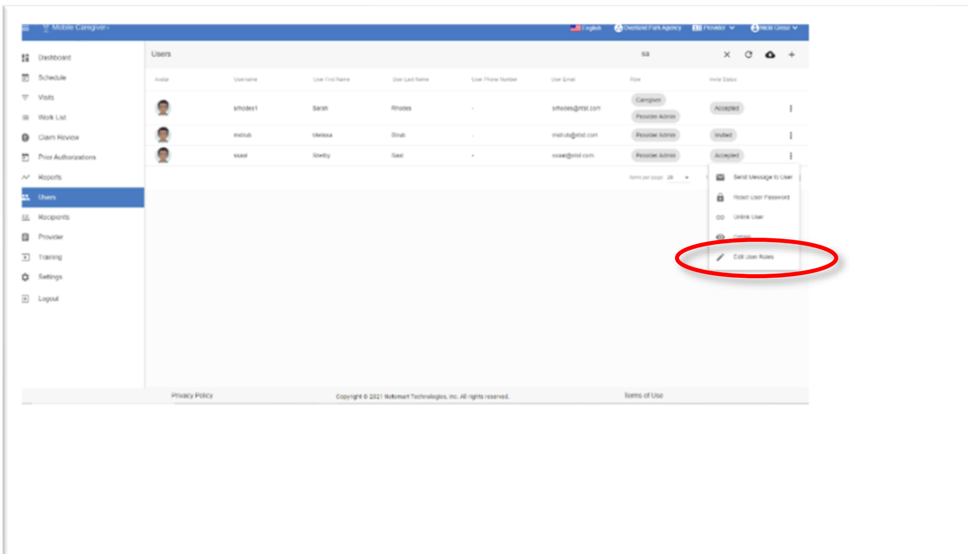
- *Viewing Users*
- *Viewing User Detail*

Editing User Roles

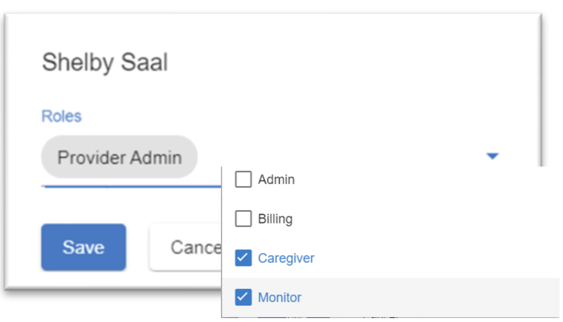
You are here: *[Mobile Caregiver+ Provider Portal User Guide]* > *[Managing Users]* > Editing User Roles

You can edit a User's role from the **Users** page.

1. From the Main Menu, click **Users**.



2. Find the User whose role(s) you want to update, then click the **Actions** icon, ⋮, located to the right of the User's record
3. From the short-cut submenu, click **Edit User Roles**.



4. From the User role dialog box, click in the **Roles** field and edit the User's role(s); multiple roles can be assigned to a single User account. Place a checkmark in the checkbox for each role you want to assign to the User.

Please refer to the User Role table for detailed information on the access rights and privileges associated with each User role.

5. Click the blue **Save** command save the changes.
   Click **Cancel** to exit the User role dialog box without saving the changes; the system will return to the Users screen.

Related Topics:

- *Viewing Users*
- *Viewing User Detail*
- *Adding a New User*
- *Inviting an Existing User to your Agency*
- *Importing a Group of New Users*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Unlinking Users from an Agency and Reassigning Tasks*
- *Updating User Detail*

Managing Recipients

You are here: *Mobile Caregiver+ Provider Portal User Guide* > Managing Recipients

Click a topic below:

Searching for and Viewing Recipients

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > Searching for and Viewing Recipients

In this topic you will find instructions for:

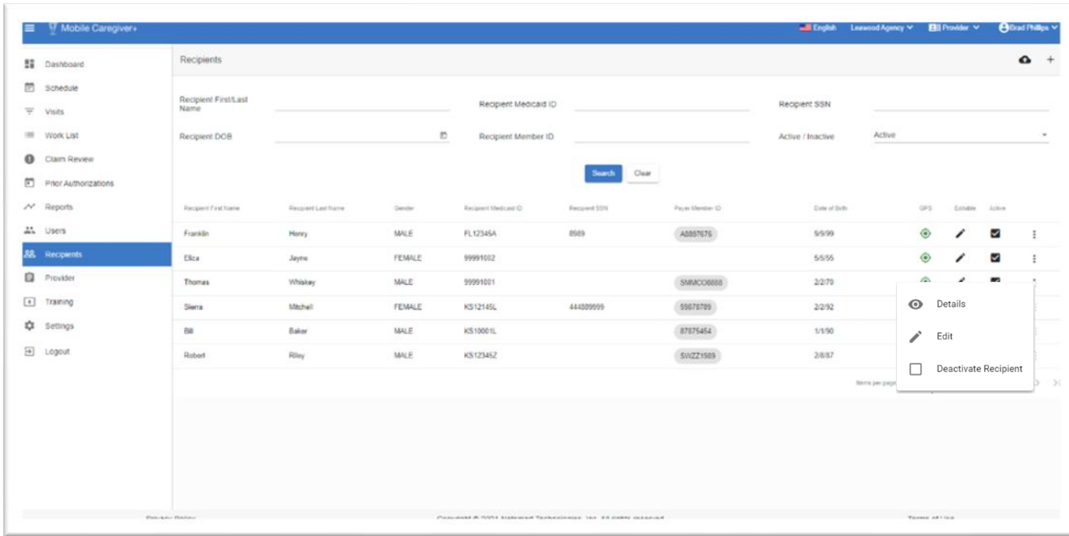
- *Viewing Recipients*
- *Changing the Number of Recipients Displayed per Page*
- *Searching for a Specific Recipient*

Viewing Recipients

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Searching for and Viewing Recipients* > Viewing Recipients

To view recipients:

1. From the Main Menu, click **Recipients**.



2. From the shortcut submenu, click **Details**

   The **Recipients** page opens and displays the following information for all Recipients:

   - First name
   - Last name
   - Gender
   - Date of birth
   - Action icon, ⋮ - click on the **Action** icon to access the following submenu options:
     - The **Edit** icon, ✎, indicates that the Recipient's profile details can be edited.

  - The **read-only icon**, , indicates that the Recipients was uploaded by a Payer; Provider Admins will have limited rights to edit a Recipient's profile i.e., adding additional address, managing emergency contact, managing diagnosis codes, etc.
- **Active** – Displays a checkmark if the Recipient profile is active (has not been deactivated).

*Note: The Recipients List can be sorted by clicking on any of the list header label, i.e., **Recipient First Name**, **Recipient Last Name**, **Gender**, or **Date of Birth**; click the same column title again to reverse the order.*

3. Click the **Actions** icon, ⋮, located to the right of the Recipient's record, to see a shortcut submenu list of management options i.e., Details, Edit, and Deactivate Recipient.

Related Topics

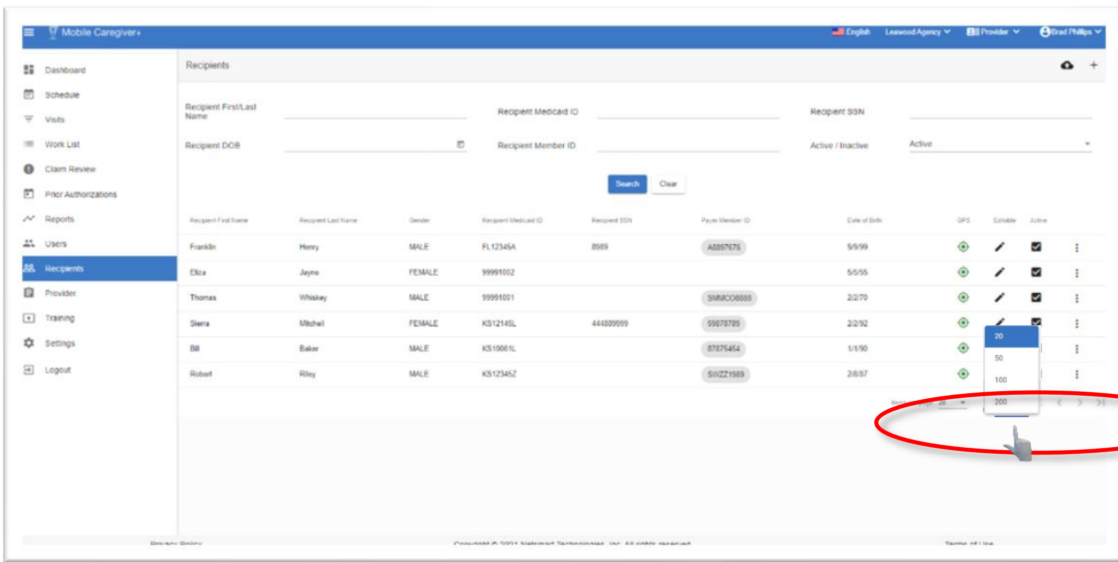
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Changing the Number of Recipients Displayed Per Page

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Searching for a viewing Recipients* > Changing the Number of Recipients Displayed Per Page

To change the number of Recipient records that are displayed on each page:

1. From the Main Menu, click **Recipients**.



2. Scroll to the bottom of the page and click in the **Items per page** field.
3. Select the number of records to be displayed on each page.
4. Click the **Items per page** dropdown arrow and select**:** 20, 50 or 100 Recipients per page.

   If the total number of Recipients exceeds the amount that can be displayed on one page, you can view additional Recipients by using the scroll arrows located at the bottom of the screen.

Related Topics

- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

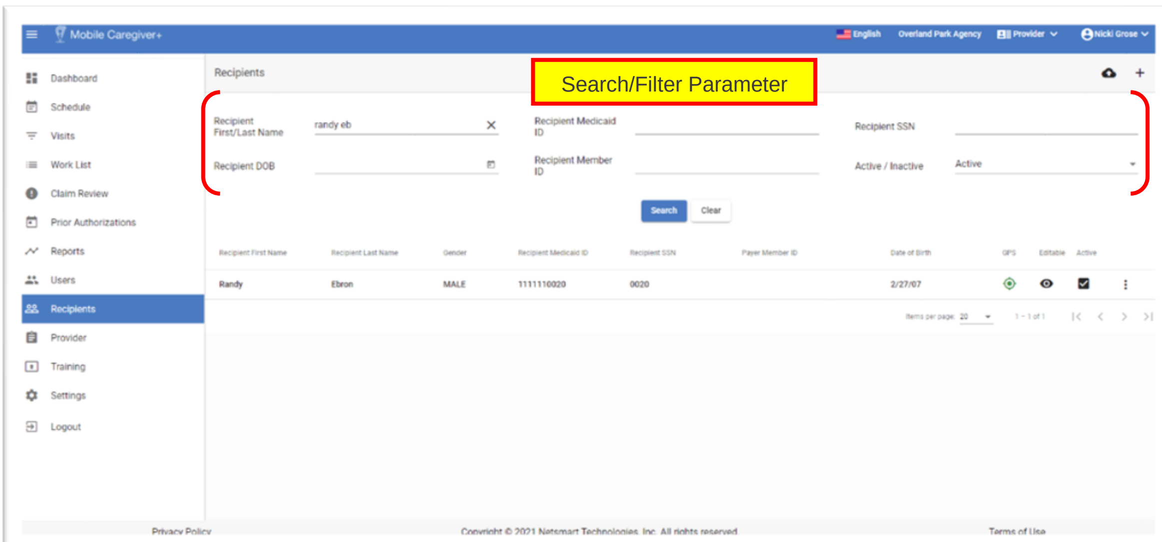
Searching for a Specific Recipient

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Searching for a viewing Recipients* > Searching for a Specific Recipient

The Mobile Caregiver+ System allows providers to manage the **Recipients List** by using the fields located in the header. Providers can filter and search the list by entering data in one or more of the fields located in the header; providers can enter data values in multiple fields to further narrow their search results.

To search for a specific Recipient:

1. From the Main Menu, click **Recipients**.



2. Enter partial or complete data values in one or more data fields located in the header – **Recipient Name/Last Name**, **Recipient Medicaid ID**, **Recipient DOB**, **Recipient Member ID,** and/or **Active/Inactive.**
3. Click the blue **Search** command to see a list of Recipients that match the search parameter(s).
   Click "X" in any field to clear the search parameter.

   Note: The Active/Inactive field defaults to "Active." Providers must select Inactive to view inactive Recipients, or All to see both active and inactive users. See

[Deactivating a Recipient] *and* [Activating an Inactive Recipient] *for more information.*

Related Topics

- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

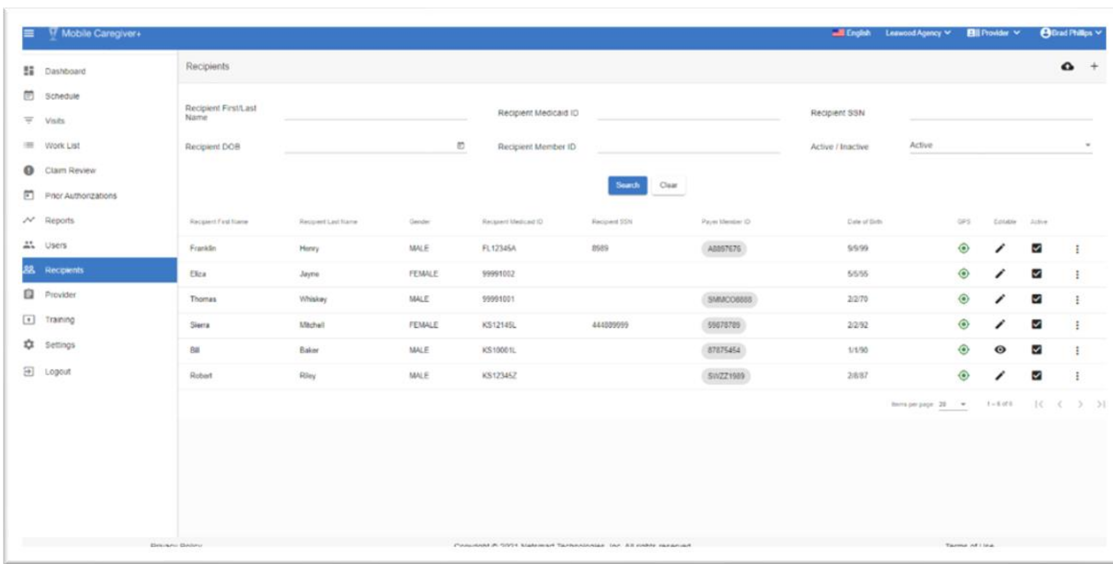
Adding New Recipients to the Mobile Caregiver+ Portal

You are here: [Mobile Caregiver+ Provider Portal User Guide] > [Managing Recipients] > Adding new Recipients to the Mobile Caregiver+ Portal

Recipients are the individuals that will receive services from Caregivers. Depending on the Payers and programs that Recipients are enrolled in, some Payers will automatically load Recipient profile data into the Mobile Caregiver+ System, while some providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. Providers who have a small number of Recipients can manually enter individual Recipients using the screens provided in their Mobile Caregiver+ Provider Portal. Providers who have a large number of Recipients may upload their Recipients using a CSV file.

To add Recipients to the Mobile Caregiver+ Portal, follow these steps:

1. From the Main Menu, click **Recipients**.



For those Payers that allow providers to add Recipients to Mobile Caregiver+ Portal, the system will display the two controls for adding Recipients:

2. Click the **Add Recipient** command, +, located in the upper right of the screen. Clicking the Add Recipient command will display the Add Recipient form, which allows providers to search for and link Recipients that have existing Mobile

Caregiver+ profiles to their agencies, or to manually enter Recipient profile data into their portals.

3. Click the **Import recipients from csv-file** command, , allows providers to upload a large number of Recipients from a CSV file.

Related Topics

- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Linking Recipients with Existing Mobile Caregiver+ Profiles to an Agency

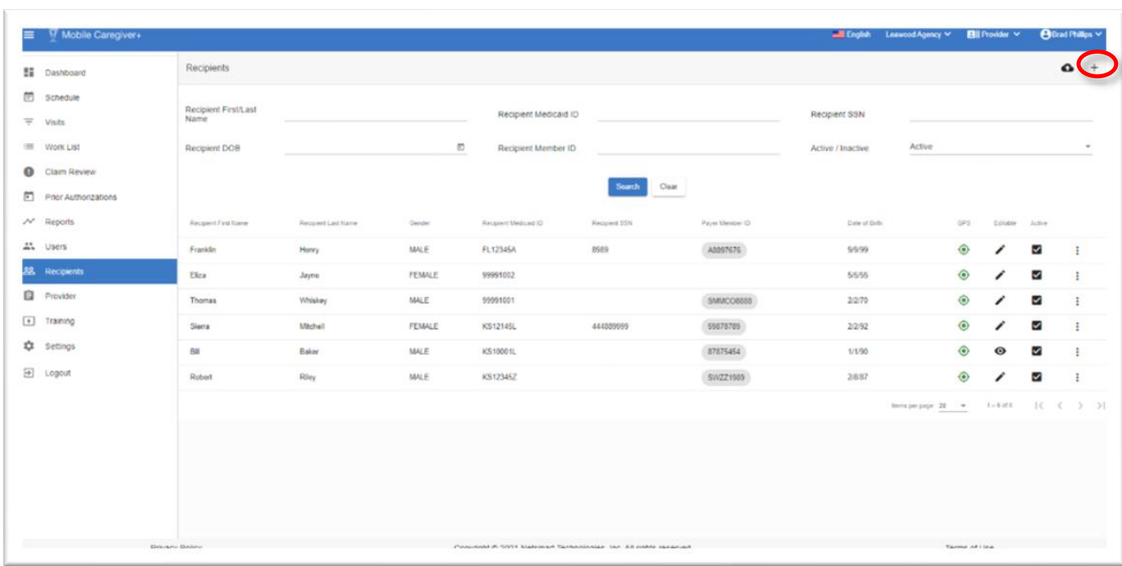
You are here: Mobile Caregiver+ *Provider Portal User Guide* > *Managing Recipients* > *Linking Recipients With Existing Mobile Caregiver+ Profiles to an Agency* > Linking Recipients with Existing Mobile Caregiver+ Profiles to an Agency

Recipients are the individuals that will receive services from Caregivers. Depending on the Payers and programs Recipients are enrolled in, some Payers will automatically load Recipients' profile data into the Mobile Caregiver+ System, while some providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. For providers that are allowed to add Recipients to the Mobile Caregiver+ Portal, they system will display the Add Recipient command, +, located in the upper right of the screen, and/or the Import recipients from csv-file command, .

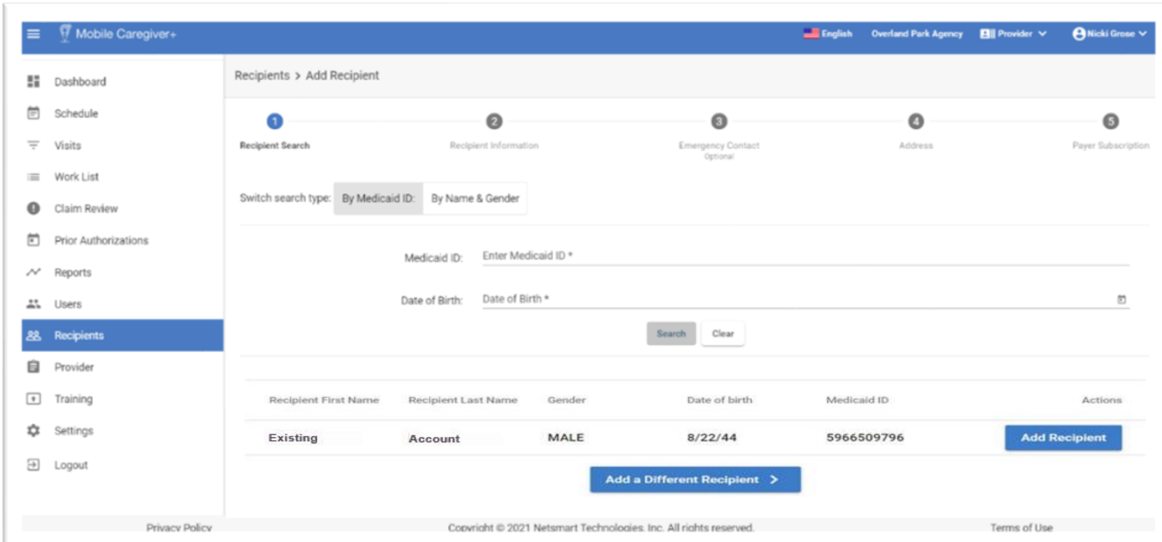
Some Recipients may already have existing Mobile Caregiver+ profiles – They might have previously received services from providers that use the Mobile Caregiver+ System. Recipients that have existing Mobile Caregiver+ Recipient profiles can simply be linked to other agencies.

To link a Recipient to an agency:

1. From the Main Menu, click **Recipients**.



2. Click the **Add Recipient** command, +, located in the upper right of the screen. The system will display the Add Recipient form.



3. Enter the Recipient's Medicaid ID.

4. Enter the Recipient's date of birth.

5. Click the blue **Search** command. The system will display any existing Mobile Caregiver+ Recipient record.

6. Click the blue **Add Recipient** command located to the right of the existing record. *The Recipient* will be linked to the current agency.

   Note: If the Recipient does not have an existing Mobile Caregiver+ Recipient account, click the blue Add a Different Recipient command to manually add the Recipient. Instructions follow in Manually Adding a Recipient: Entries.

Related Topics

- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Manually Adding Recipients

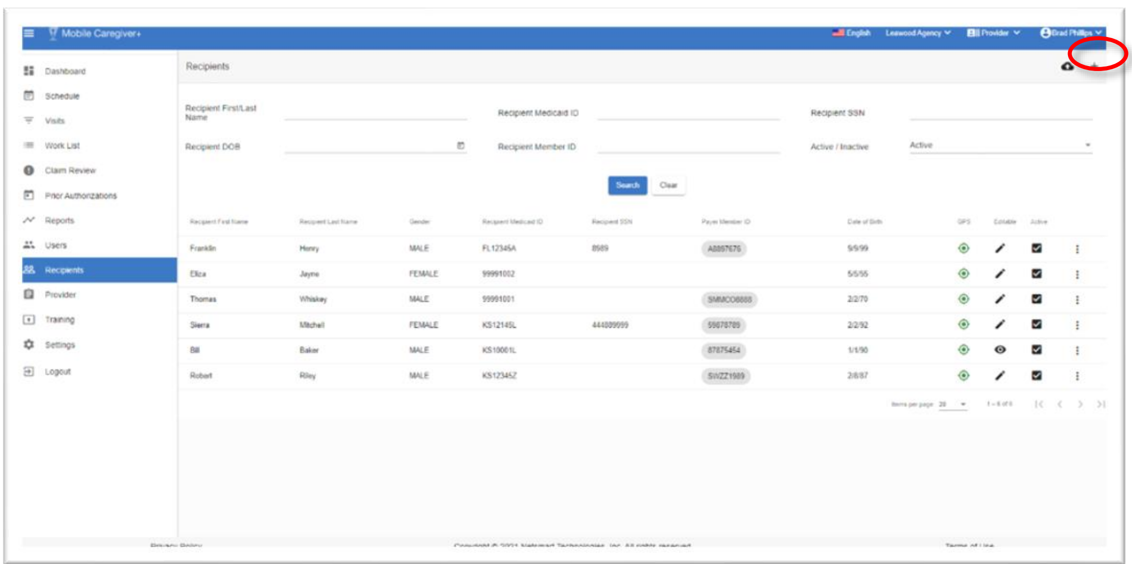
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > Manually Adding Recipients

Depending on the Payers and programs Recipients are enrolled in, some Payers will automatically load Recipients' profile data into the Mobile Caregiver+ System, while some providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. For providers that are allowed to add Recipients to the Mobile Caregiver+ Portal, the system will display the Add Recipient command, +, located in the upper right of the screen, and/or the Import recipients from csv-file command, .

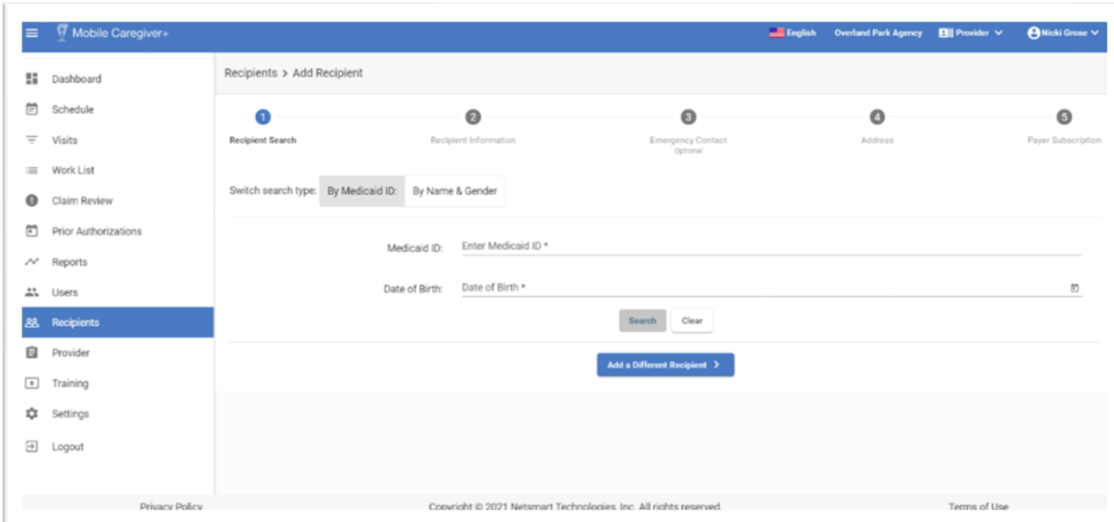
To manually add a Recipient to an agency:

Entering Recipient Information

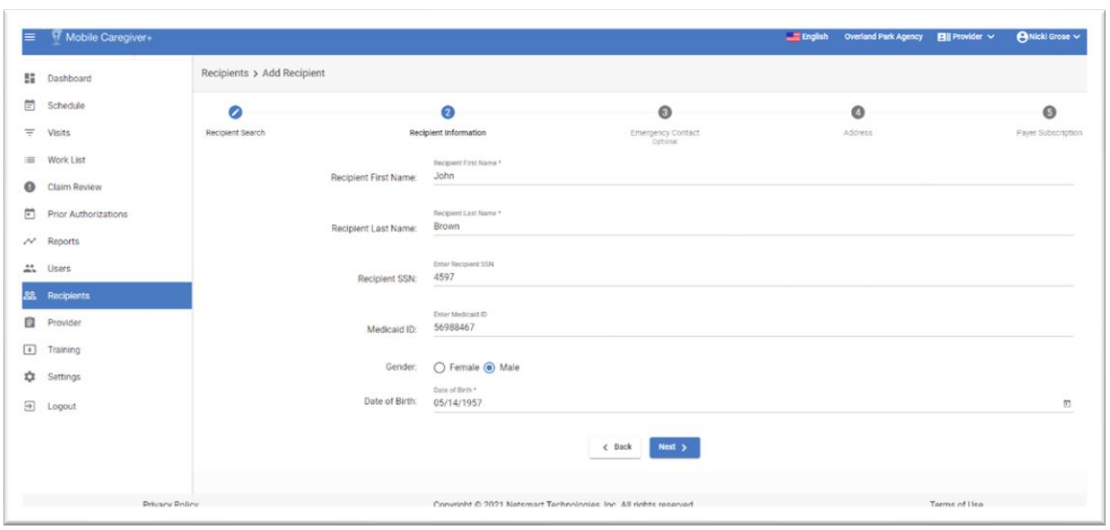
1. From the Main Menu, click **Recipients**.



2. Click the **Add Recipient** command, +, located in the upper right of the screen. The system will display the Add Recipient form.



3. Click the blue **Add a different Recipient** command. The system will display the Recipient Information tab (the second (2) of five (5) tabs).



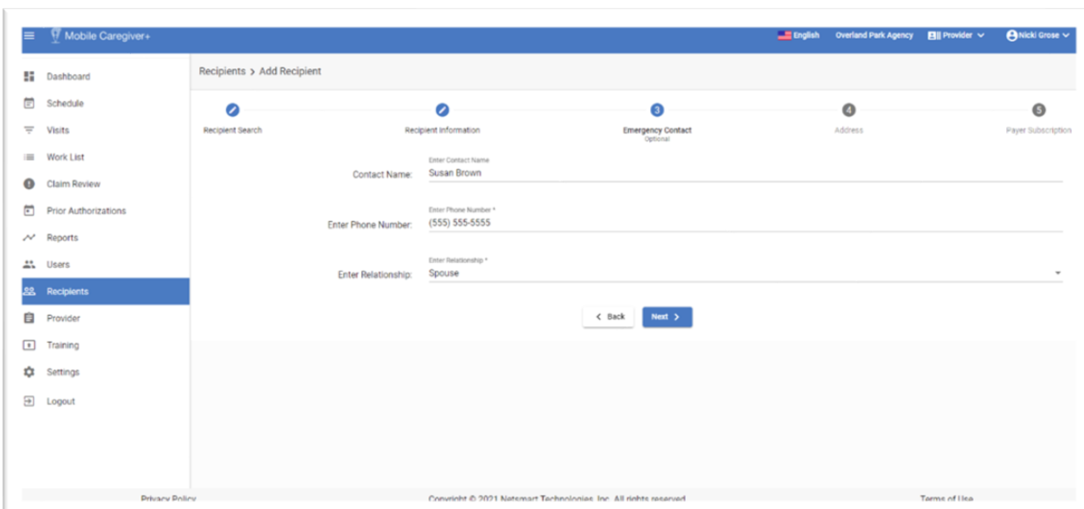
4. Enter the Recipient's information. All fields that display an asterisk, *, are mandatory – You must enter information in mandatory fields.
   i. Recipient First name*: Enter the new Recipient's first name.
   ii. Recipient Last name*: Enter the new Recipient's last name.
   iii. SSN **(Last 4):** Enter the last 4 digits of the new Recipient's social security number**.**
   iv. Gender: Select the gender using the radio buttons. The default selection is male.

v. Date of Birth*: Enter the Recipient's date of birth by typing the date by clicking and selecting a date from the calendar.

5. Click **Next**. The system will display the **Emergency Contact Information** tab (the third of five tabs).

   Note: Clicking Next does not save your entries. You will save at the last tab, Payer Subscription. Do not use your browser's Back button at any point while you enter Recipients. If you do, you will return to the main Recipients page and your entries will be lost.

Entering Emergency Contact Information



6. You have the option to enter the Recipient's Emergency Contact information:

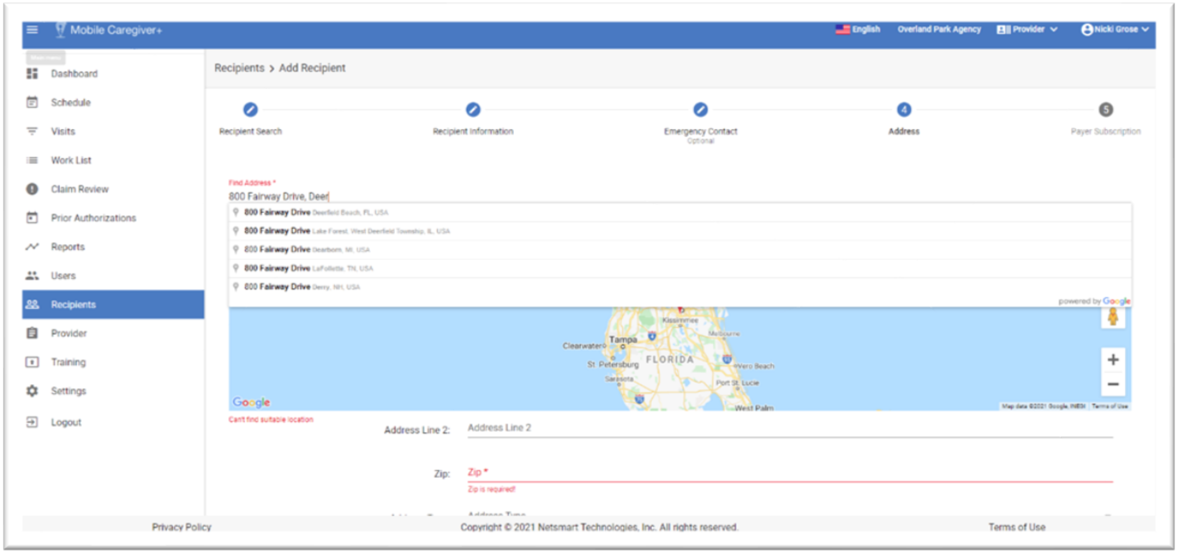
   i. Contact Name: Enter the Emergency Contact's Name.

   ii. Enter Phone Number: Enter the Emergency Contact's Phone Number.

   iii. Enter Relationship: Use the dropdown list to select the Emergency Contact's relationship to the Recipient. Choose **None**, **Child**, **Friend**, **Other**, **Parent**, **Sibling**, **Spouse,** or **Unknown**.

7. Click Next. The system will display the Address tab (the fourth of five tabs).

Entering a Recipient Address

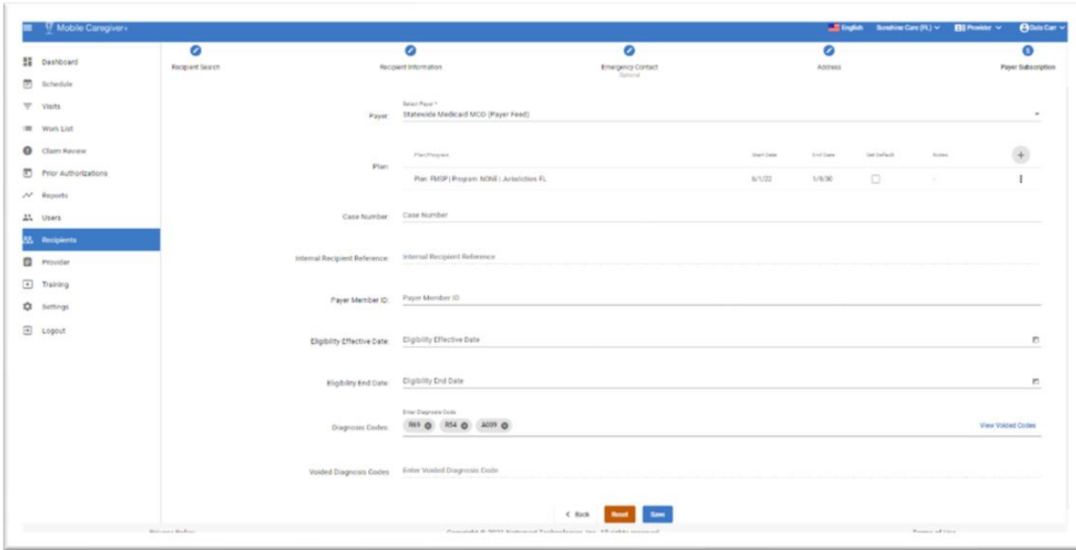


8. Search for and select the Recipient's address:
   i. Be sure to start typing the Recipient's address in the **Find Address** field – the system will display a list of matching validated Google Maps validated addresses.
   ii. Select the correct address from the list.

   Note: If the address you are entering is not found in Google Maps, open another browser window, and use Google to search for the address (to see how it appears in their database). For example, Google may have NE as North East or vice versa, or Lakepoint as Lake Point or vice versa.

   iii. Select the Address Type – it is important that providers select an Address Type (Place of Service) to ensure compliance with Payer's rules that require services be rendered at designated locations.
   iv. Enter the Recipient's Primary Phone – You are required to enter the Recipients phone number.
   v. Enter any other optional data.
9. Click Next. The system will display the Payer Subscription tab (the fifth of five tabs).

Entering Payer Subscription Information



10. Enter Payer Subscription information:

    i. Payer*: Select the Payer from the drop-down list.

    ii. Plan: Click the Add New Plan icon, + , to select the Recipient's Plan name, Program name and Jurisdiction.

    iii. Case Number: Enter the case number.

    iv. Member ID: Enter the Member's ID.

    v. Eligibility Effective Date: Enter the date that eligibility became effective.

    vi. Eligibility End Date: Enter the date that eligibility ends.

    vii. Authorization Effective Date: Enter the date that the prior authorization become effective.

    viii. Authorization End Date: Enter the date that the prior authorization ends.

    ix. Diagnosis Code*: Provider must enter at least one diagnosis code.

    Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; Recipients' Diagnosis Codes will be populated into rendered service *records in the same order as they appear in the Recipient's Mobile Caregiver+ profile.****

11. Click the **Save** command to add the Recipient to the Mobile Caregiver+ Provider Portal; the system will automatically link the Recipient to the agency

    Note: At this point you can also choose to click the Back command to go back and review/edit data on the previous tabs.
    Do not use your browser's Back button. You will return to the Recipients page and all information will be lost.
    If the Recipient requires a Referring Physician, please review Editing a Recipient and/or Entering a Referring Physician.

Related topics:

- *Searching for and Viewing Recipients*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Importing Recipients From a CSV-File

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > Importing Recipients From a CSV-File

Recipients are the individuals that will receive services from Caregivers. Depending on the Payers and programs Recipients are enrolled in, some Payers will automatically load a Recipient's profile data into the Mobile Caregiver+ System, while some providers may be allowed to add Recipients to their Mobile Caregiver+ Provider Portal. For providers that are allowed to add Recipients to the Mobile Caregiver+ Portal, they system will display the Add Recipient command, +, located in the upper right of the screen, and/or the Import recipients from csv-file command, .
Providers that are adding a large number of Recipients to the Mobile Caregiver+ Portal should use **the Import recipients from csv-file** function to expedite the process.

Entering Recipient Profile Data

To enter a Recipient's profile data into a CSV file:

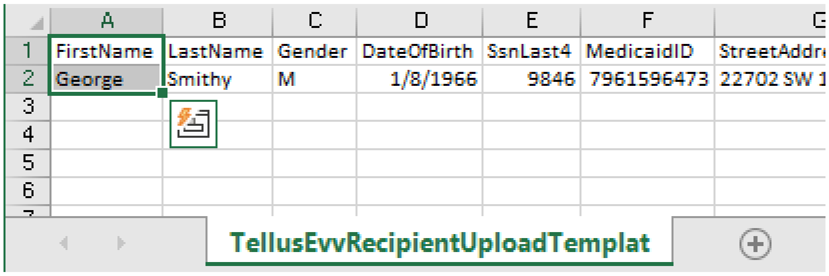
1. Contact the Netsmart Client Support Team to obtain a copy of the EvvRecipientUploadTemplate.csv template and the Upload Instructions Guide.
2. Read the instruction guide.
3. Open the EvvRecipientUploadTemplate.csv with Excel or another application.
4. Using the instruction guide, enter the Recipient's profile data into the EvvRecipientUploadTemplate.csv file.

   Note: This file includes one row of sample data for an example to work for you to follow. Please remember to delete this row before uploading.

   Each column in the excel file has specific rules about what is an acceptable entry, the rules are explained in more detail below.

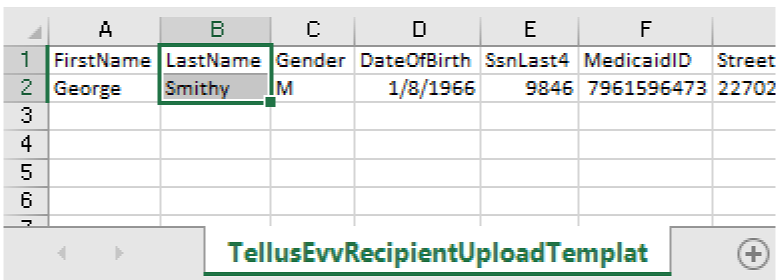
   Keep in mind, when you edit this template in Excel or Google Sheets, you ***must save the file as .csv file before uploading****.*

<u>Column A –</u> Recipient First Name.



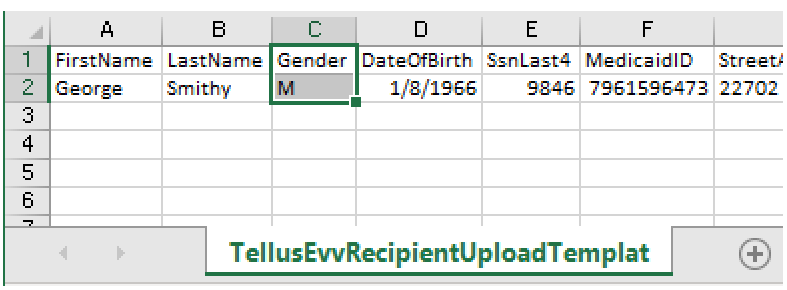
- FirstName is a mandatory field.
- FirstName allows for letters and spaces only (no numbers or special characters).
- FirstName can be up to 255 characters in length or less.

<u>Column B –</u> Recipient Last Name.



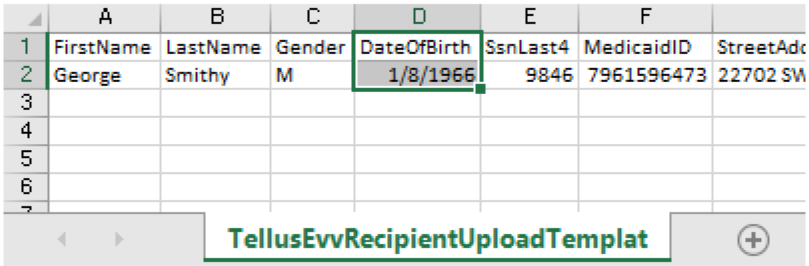
- LastName is a mandatory field.
- LastName allows for letters and spaces only (no numbers or special characters).
- LastName can be up to 255 characters in length or less.

<u>Column C –</u> Gender.



- Recipient Gender is a mandatory field.
- The following single-character codes are the only acceptable entries:
  - M = Male.
  - F = Female.
  - N = Non-Binary.
  - O = Other.
  - U = Unknown.

<u>Column D –</u> Recipient Date of Birth.

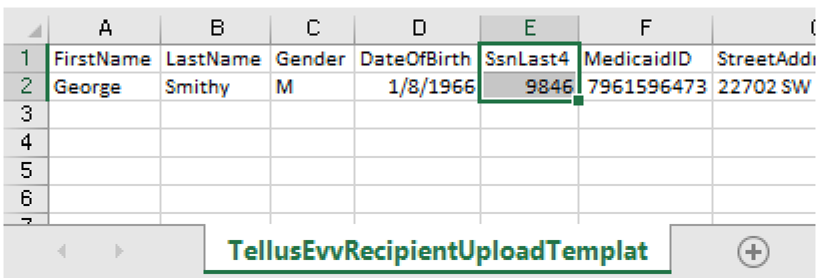


	A	B	C	D	E	F	
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAdc
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW
3							
4							
5							
6							

TellusEvvRecipientUploadTemplat

- DateOfBirth is a mandatory field.
- DateOfBirth must be in MONTH/DAY/YEAR format, and allows for numbers, and "/" only, (no letters, spaces, or special characters other than "/").
  - Example: 01/15/1965.

<u>Column E –</u> Recipient Last 4 Digits of Social Security Number.

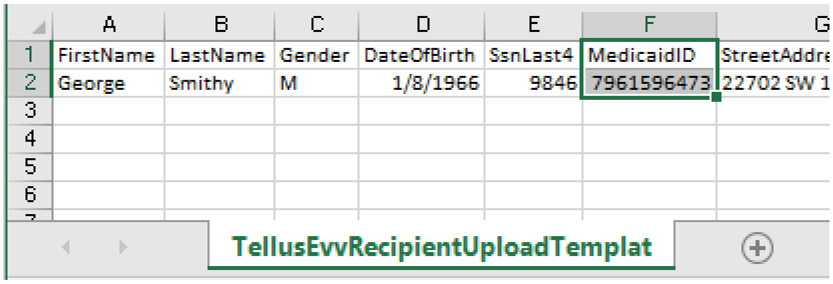


	A	B	C	D	E	F	
1	FirstName	LastName	Gender	DateOfBirth	SsnLast4	MedicaidID	StreetAddı
2	George	Smithy	M	1/8/1966	9846	7961596473	22702 SW
3							
4							
5							
6							

TellusEvvRecipientUploadTemplat

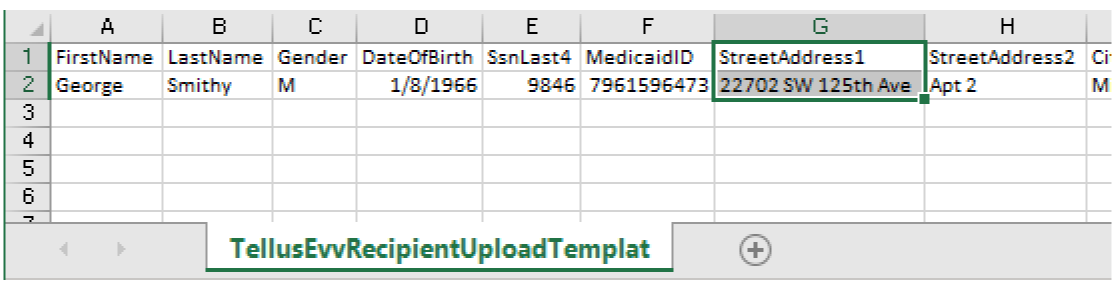
- SsnLast4 is an optional field.
- SsnLast4 must be 4 digits in length, and allows numbers only (no letters, spaces, special characters).
- If a Recipient's Last 4 digits starts with a zero saving the csv file will remove the zero but our system will pad a leading zero to keep it 4 digits.
- Example after saving CSV file SSN is 123 => after import SSN is 0123.

Column F – Recipient Medicaid ID.



- MedicaidID is a conditional field. Either Medicaid ID or Payer Member ID must be populated.
- MedicaidID must be 9 - 13 digits in length, and allows for numbers and letters only, (no spaces, or special characters).
- There should not be any spaces BEFORE the MedicaidID number starts, for example: “123456789” is valid, and “123456789” is not valid because there is a space before the “1”.
- If MedicaidID starts with zero, add letter “M” in front to keep leading Zero. Some applications remove zero after saving as .CSV, our application will remove letter “M” after import is successful.

Column G – Recipient Street Address Line 1



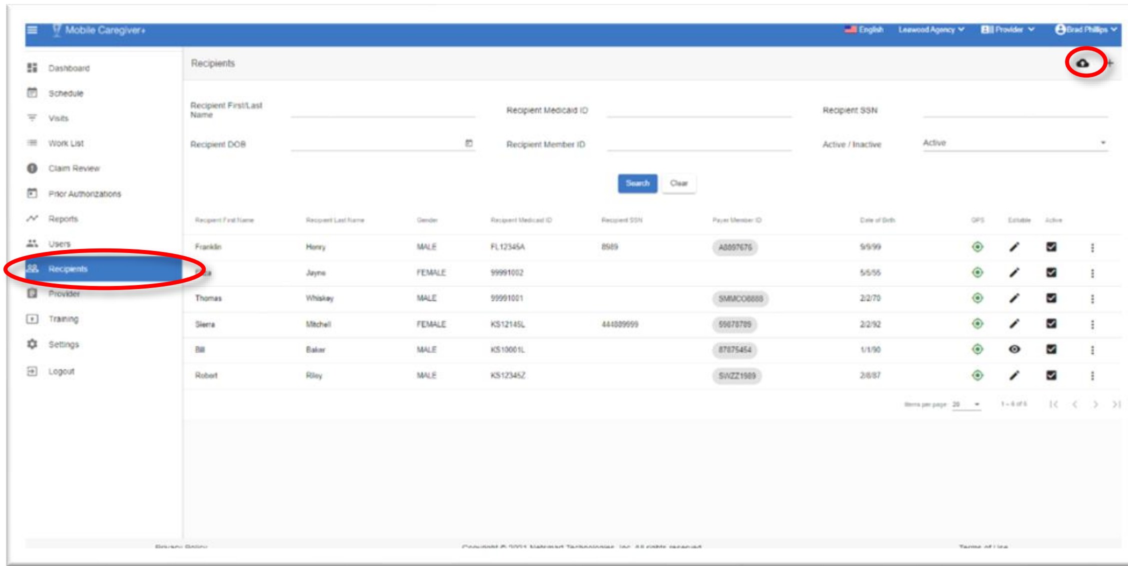
- StreetAddress1 is a mandatory field
- StreetAddress1 can be up to 40 characters in length or less
- StreetAddress1 may **only** contain:
  - Letters
  - Numbers
  - Spaces
  - These *special characters*:
    - # (number sign)
    - ‘ (apostrophe)
    - . (period)
    - , (comma)
    - - (hyphen)
    - / (forward slash)

5. Be sure to save the document as a CSV file.

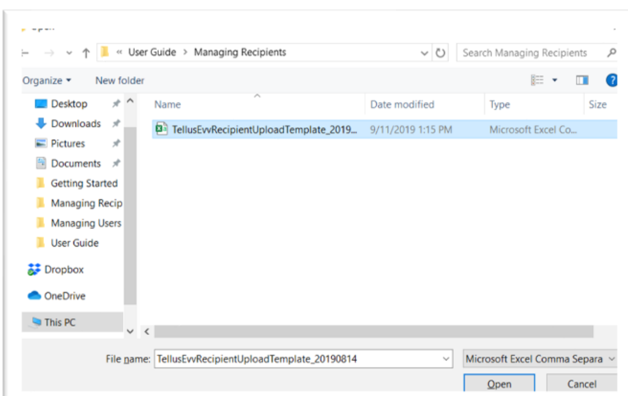
Importing Recipient Into the Mobile Caregiver+ Portal

To import Recipients from the CSV file:

1. From the Main Menu, click the **Recipients**.



2. Click the **Import recipients from csv-file** icon, , located in the upper right corner of the screen. The system will display the Open File Explorer dialog box.

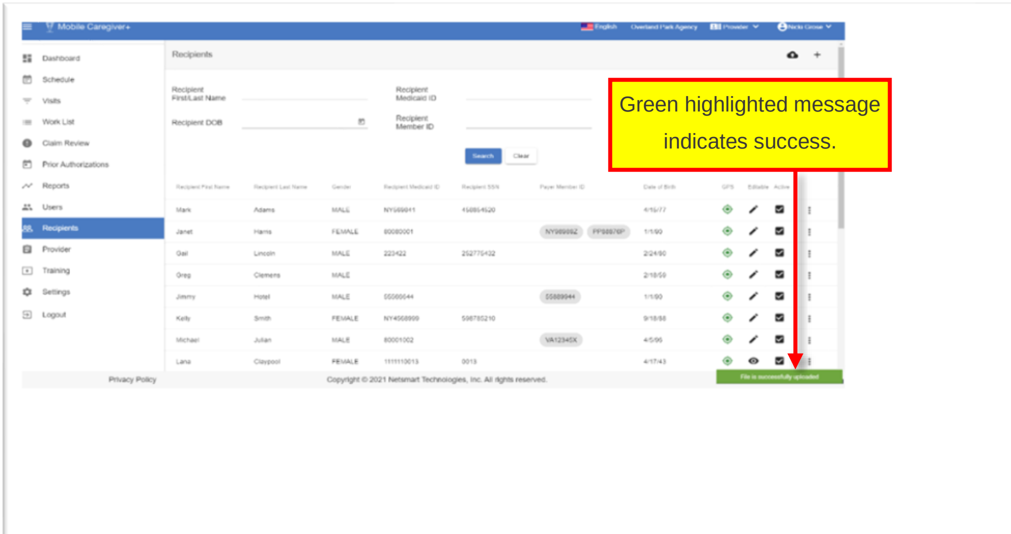


3. Locate and click on the CSV file.
4. Click **Open.**

   The upload process will begin once the file is selected

   Upon successful upload, a small green box in the bottom right-hand of your screen will quickly show, saying ‘Success’

Your screen will also update, and you should see your Recipients populated below the headers:



If any errors are identified, a message containing the exact row(s) and column(s) of the error will be shown on your screen.

Please refer to the guide above to troubleshoot the exact error(s)

Note: If there are any errors detected by the system, no records from your file will upload, the entire file must be error free before any recipient records will upload.

Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Linking Caregivers to Recipients from the Linked Users Tab

Caregivers can only view PHI data for the Recipients they are assigned to work with, and have been linked to, by their Provider Admins.

For Caregivers to view a Recipient's data/profile, the Caregiver must be linked to the Recipient from the Provider Portal. Provider Admins now have access rights to Link Caregivers to Recipients from a Recipient's Linked Users tab**.**

Provider Admins can link Caregivers to Recipients by one of two methods:

- Linking the Caregiver to each Recipient from the Linked Users tab of each Recipient that is assigned to the Caregiver.
- By scheduling the first visit for each Recipient that is assigned to the Caregiver using Add New Visit function.

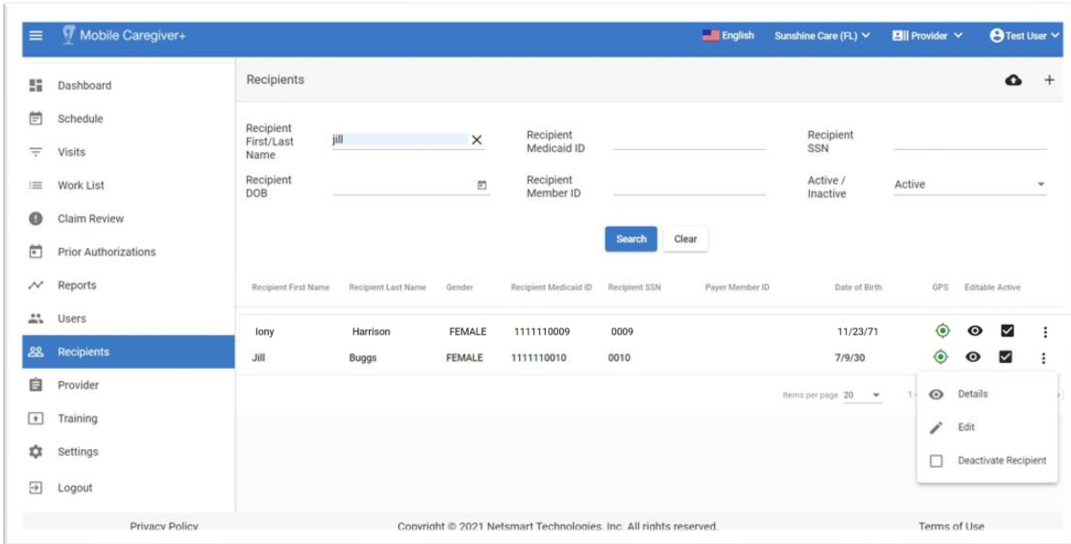
This document provides instructions on linking Caregivers to Recipients from the Linked Users tab; please refer to Adding/Scheduling Visits for detailed instruction on scheduling visits.

Provider Admins have access rights to Link and Unlink Caregivers to Recipients from each Recipient's Linked Users tab.

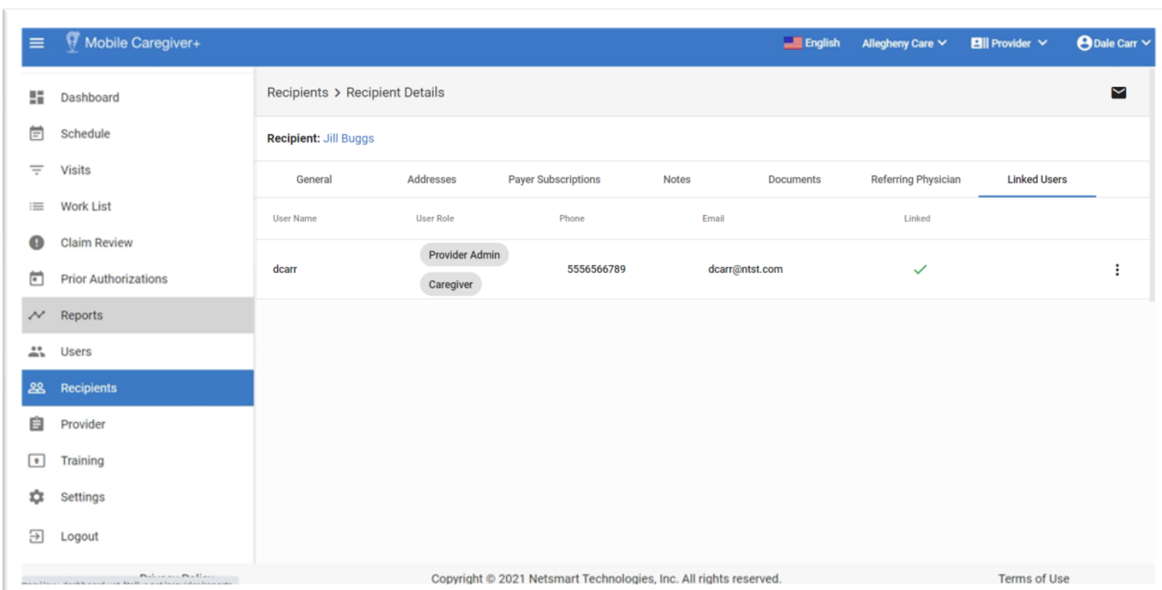
Warning: Linking a Caregiver to a Recipient will grant the Caregiver access rights to view PHI data for the Recipient.

To link a Caregiver to a Recipient from the Linked Users tab:

1. From the Main Menu, click Recipients.



2. From the Recipients search list, locate and click on the **Actions** icon, ⋮, for the Recipient you want to link to the Caregiver.
3. From the shortcut submenu, click **Details**.



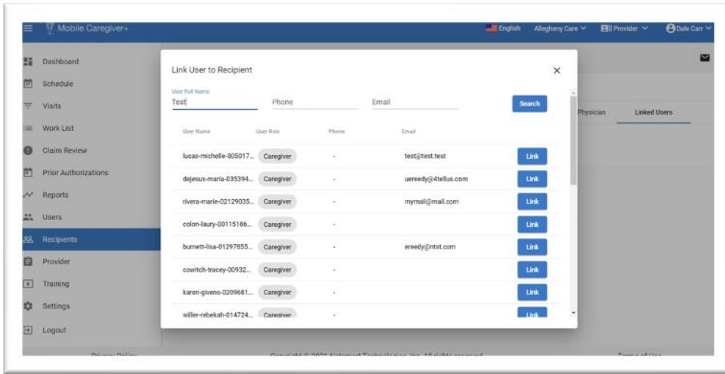
4. From the Recipient Details screen, click on the **Linked Users** tab.

   The system will display the Linked Users table with a list of all users that have been linked to the selected Recipient.

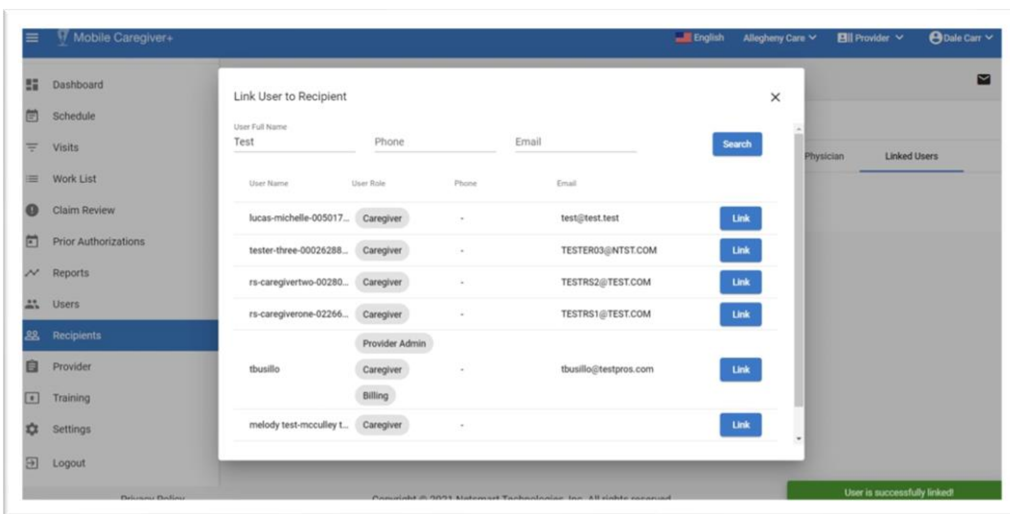
   - The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the user.

- The **Linked** status field will display the Unlinked icon, ×, if the user is not currently, but was previously, linked to the selected **Recipient**.

5. From the **Linked Users** table, click the **Link User to Recipient** icon, +, located below the list of linked users. The system will display the Link User to Recipient screen.



6. Enter the Caregiver's Full Name, Phone number, or Email address in one or more of the search fields in the header.
7. Click the blue **Search** command.

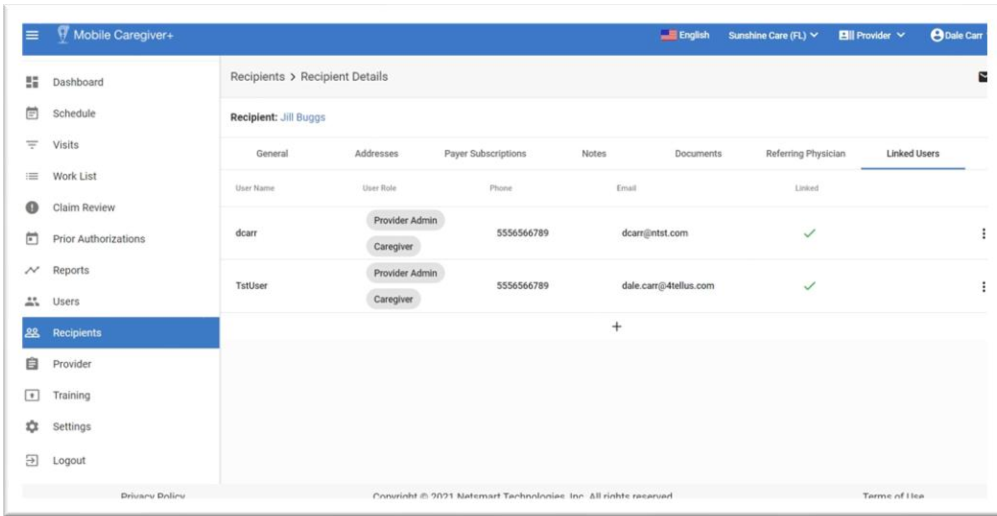


Note: The system will display a list of all existing Netsmart EVV user Accounts that have a matching name, email address, or phone number in the respective profiles.

8. Locate the user's record and click the blue **Link** command, to link the Caregiver to the Recipient.

   Note: The system will link the current Recipient to the Caregiver by creating a new User/Recipient link record. An audit record will be created with the link date.

9. Click the close command, the "X" in the upper right corner, to close the Link User to Recipient screen.



Note: The system will display a green checkmark in the ***Link*** *status field, indicating that the Caregiver has an active link to the selected Recipient.*

Related Topics:

- [Searching for and Viewing Recipients]()
- [Adding a New Recipient]()
- [Editing a Recipient]()
- [Uploading Documents for a Recipient]()
- [Deactivating a Recipient]()
- [Activating an Inactive Recipient]()

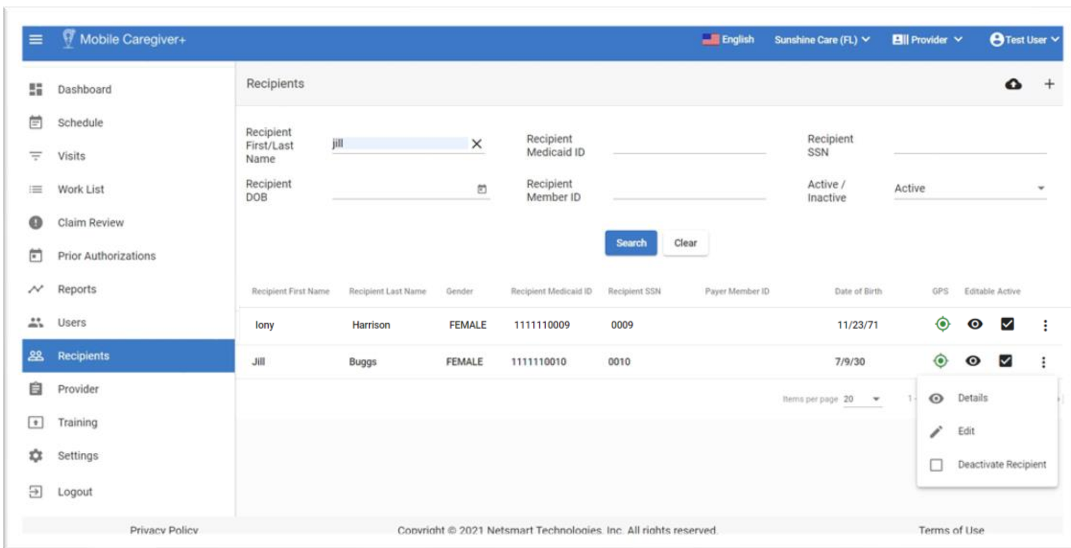
Unlinking Caregivers from Recipients from the Linked Users Tab

Provider Admins have access rights to Link and Unlink Caregivers to Recipients from each Recipient's Linked Users tab.

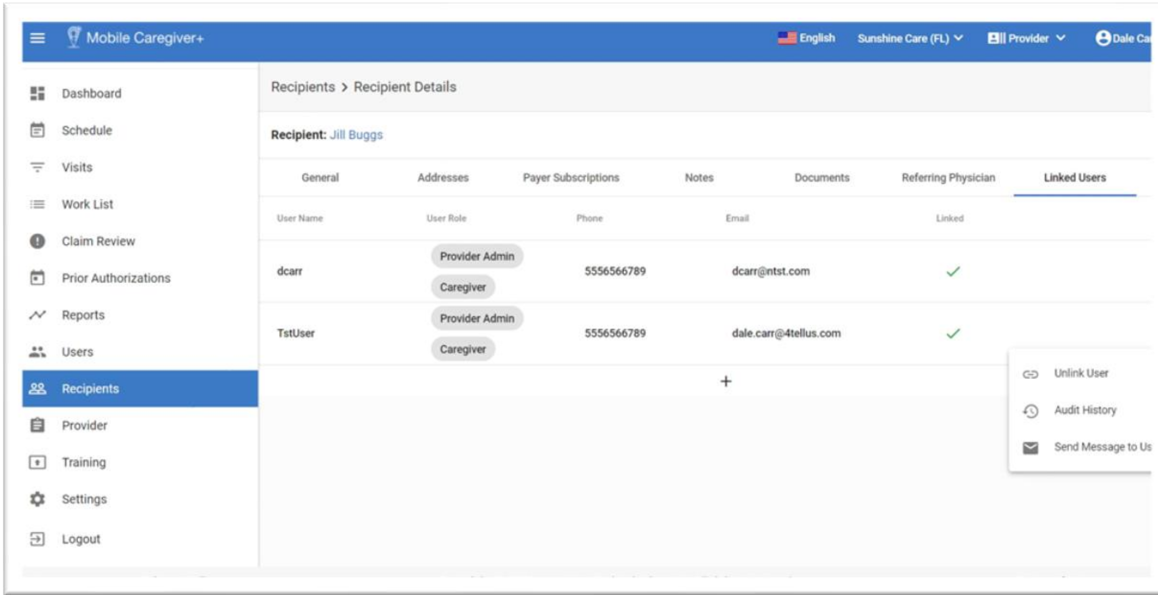
Warning: Unlinking a Caregiver from a Recipient will cancel the Caregiver's access rights to view PHI data for the Recipient. The system will automatically cancel all future visits that the Caregiver has scheduled with the Recipient.

To unlink a Caregiver from a Recipient from the Linked Users tab:

1. From the Main Menu, click **Recipients**.



2. From the Recipients search list, locate and click on the **Actions** icon, ⋮, for the Recipient you want unlink from the Caregiver.
3. From the shortcut submenu, click **Details**.

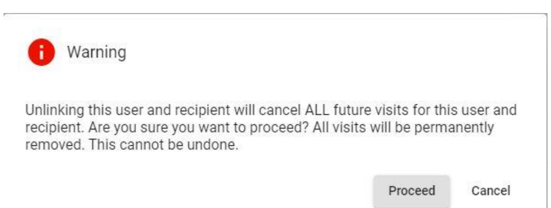


4. Click on the **Linked Users** tab.

   The system will display the Linked Users table with a list of all users that have been linked to the selected Recipient.

   - The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the user.
   - The Linked status field will display the Unlinked icon, ✕ , if the user is not currently, but was previously, linked to the selected Recipient.

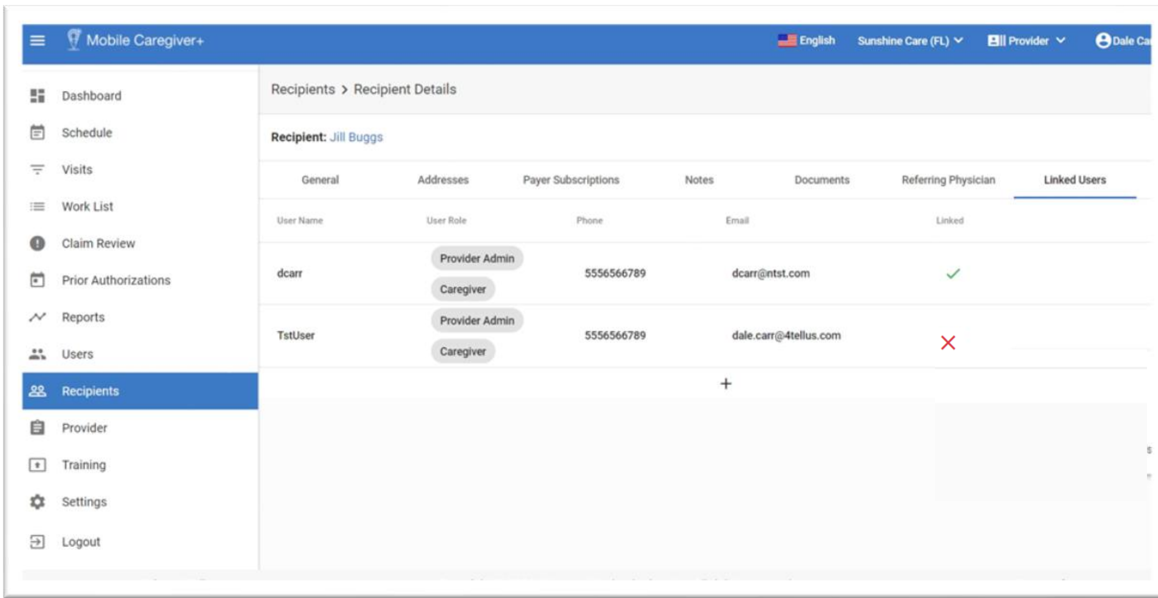
5. Click on the **Actions** icon, ⋮,located to the right of the linked Caregiver's record.
6. From the shortcut submenu, click the **Unlink User**.



7. From the Unlink User warning confirmation dialog box, click **Proceed** to unlink the Caregiver.

   Note: The system will unlink the Caregiver from the selected Recipient. An audit record will be created with the unlinked date.

Warning: Unlinking a Caregiver will automatically revoke the Caregiver's access to PHI data for the Recipient and cancel all future visits that have been scheduled with the Recipient. *If you want to reassign scheduled visits to a different Caregiver, you must reschedule the visits prior to unlinking the Caregiver.*



Note: The system will display a red "✕ " in the Link status field, indicating that the Caregiver does not have an active link to the selected Recipient

Related Topics:

- [Searching for and Viewing Recipients]()
- [Adding a New Recipient]()
- [Editing a Recipient]()
- [Uploading Documents for a Recipient]()
- [Deactivating a Recipient]()
- [Activating an Inactive Recipient]()

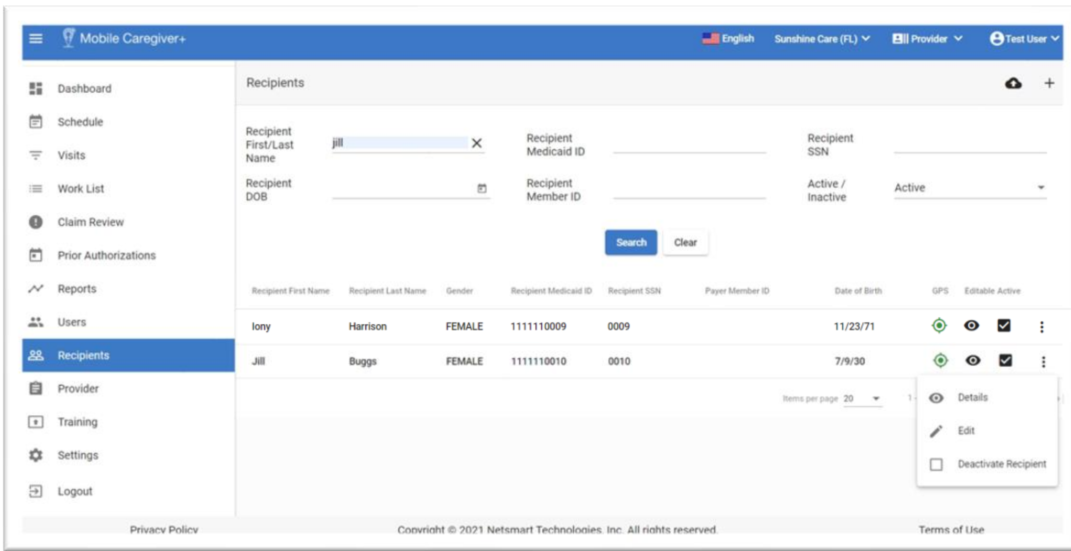
Relinking Caregivers to Recipients from the Linked Users Tab

Provider Admins have access rights to Link and Unlink Caregivers to Recipients from each Recipient's Linked Users tab.

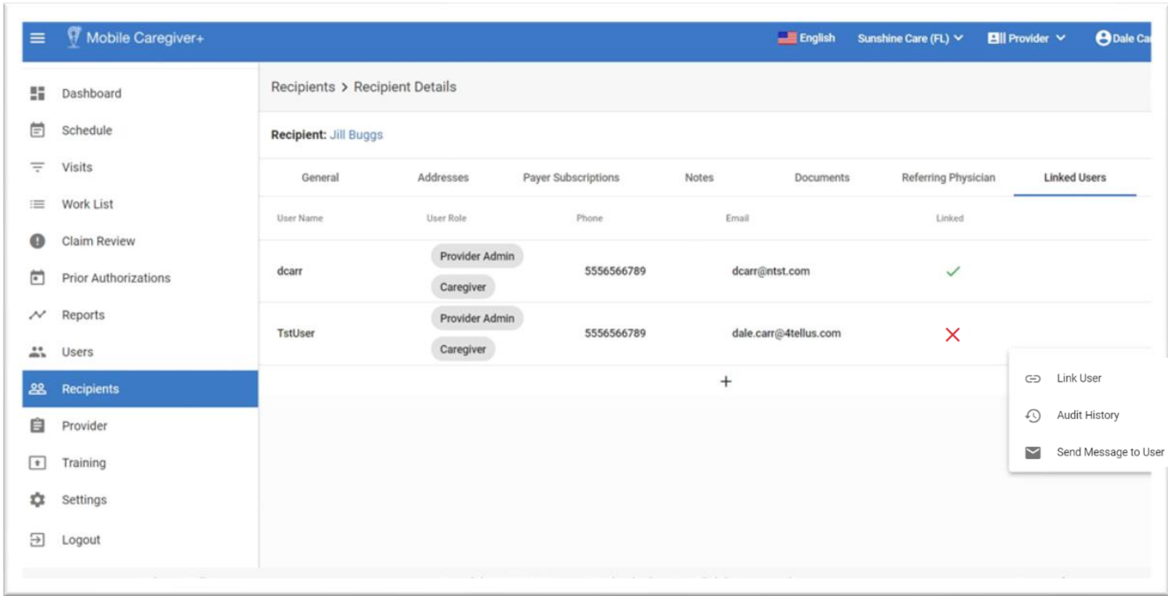
Warning: Linking a Caregiver to a Recipient will grant the Caregiver access rights to view PHI data for the Recipient.

To relink a Caregiver to a Recipient from the Linked Users tab:

1. From the Main Menu, click **Recipients**.



2. From the Recipients search list, locate and click on the **Actions** icon, ⋮, for the Recipient you want relink to the Caregiver.
3. From the shortcut submenu, click **Details**.



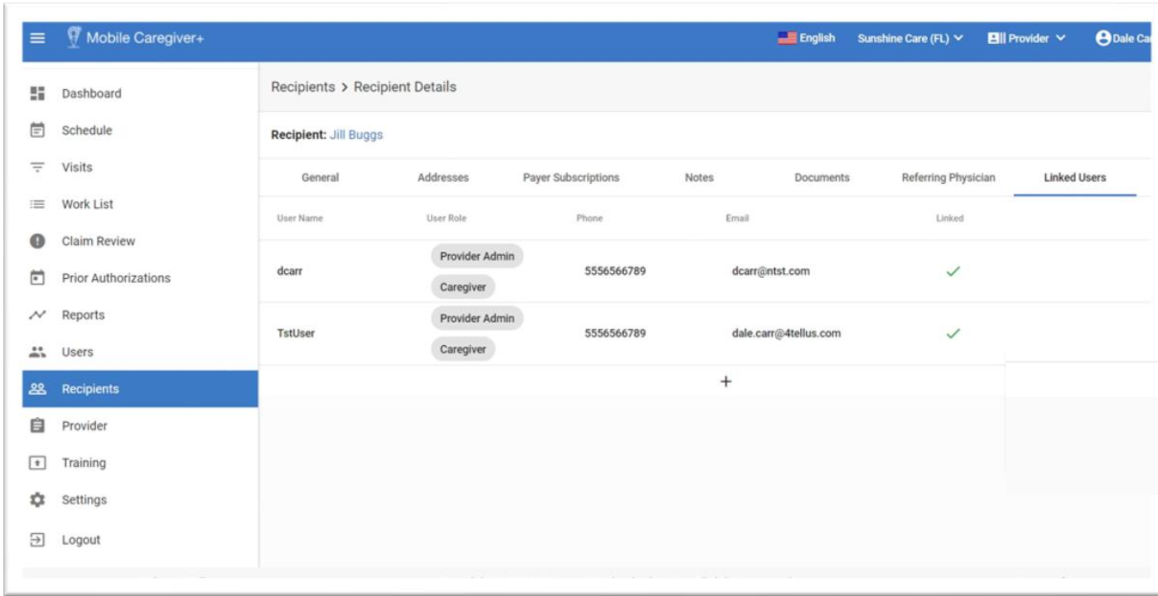
4. Click on the **Linked Users** tab.

   The system will display the **Linked Users** table with a list of all users that have been linked to the selected Recipient.

   - The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the user.
   - The Linked status field will display the Unlinked icon, ✕, if the user is not currently, but was previously, linked to the selected Recipient.

5. Click on the **Actions** icon, ⋮,located to the right of the unlinked Caregiver's record.
6. From the shortcut submenu, click **Link User**.

   Note: The system will relink the Caregiver to the selected Recipient. An audit record will be created with the linked date.



The system will display a green checkmark "✓" in the Link status field, indicating that the Caregiver currently has an active link to the selected Recipient

Related Topics:

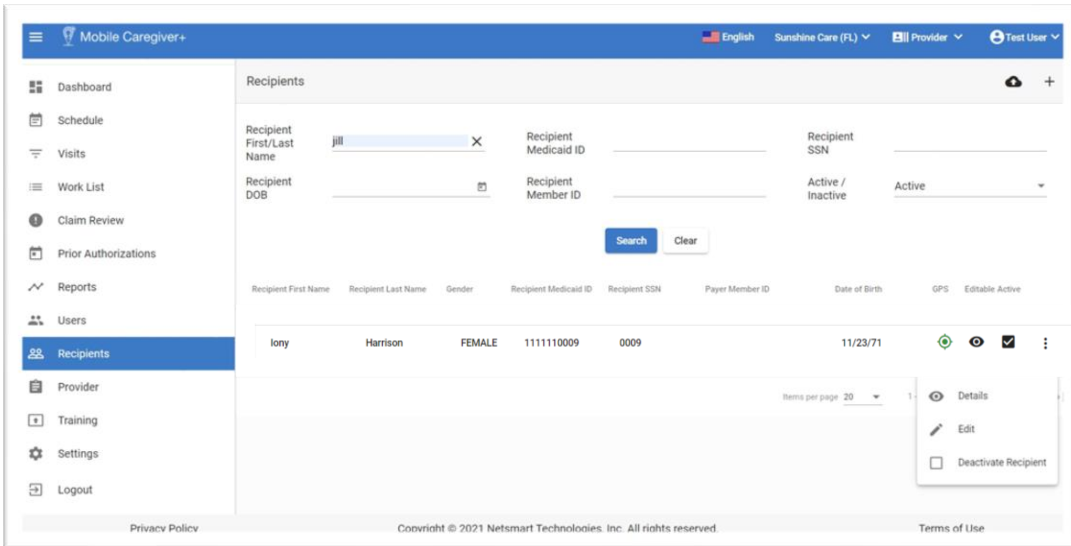
- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Reviewing Caregivers Link Audit History

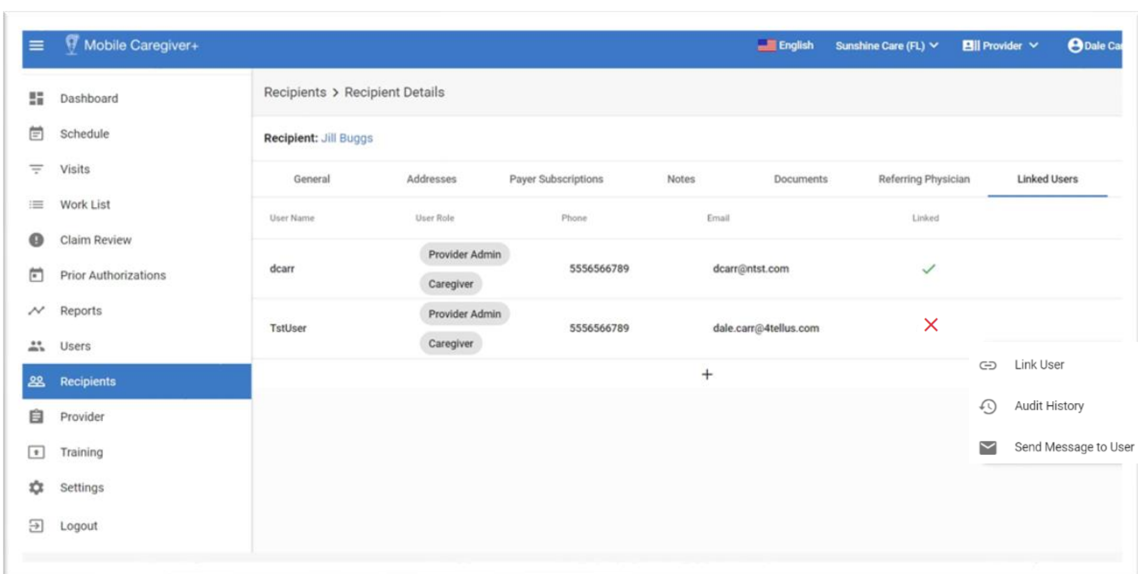
Providers have access rights the Link Audit History reports for Caregivers.

To review the Link Audit History for a Caregiver:

1. From the Main Menu, click **Recipients**.



2. From the Recipients search list, locate and click on the **Actions** icon, ⋮, for the Recipient you want to review the link audit history.
3. From the shortcut submenu, click **Details**.



4. Click on the **Linked Users** tab.

The system will display the Linked Users table with a list of all users that have been linked to the selected Recipient.

- The Linked status field will display the Linked icon, ✓, if the Recipient currently has an active link to the user.
- The Linked status field will display the Unlinked icon, ×, if the user is not currently, but was previously, linked to the selected Recipient.

5. Click on the Actions icon, ⋮, located to the right of the unlinked Caregiver's record.
6. From the shortcut submenu, click **Audit History**.

Note: The system will display the Link Audit History for the Caregiver.

Related Topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

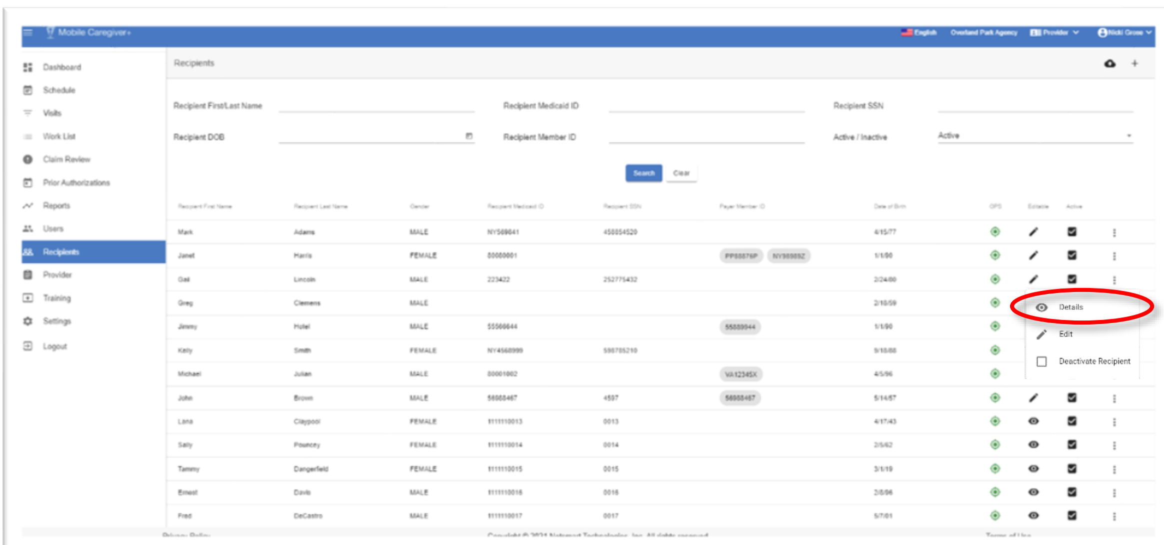
Viewing Designee Information

You are here: Mobile Caregiver+ Provider Portal User Guide > Managing Recipients > Viewing Designee Information

A Provider Administrator has the ability to view designee information that is passed from the CareRecord.

To view designee information:

1. From the Main Menu, click **Recipients**.

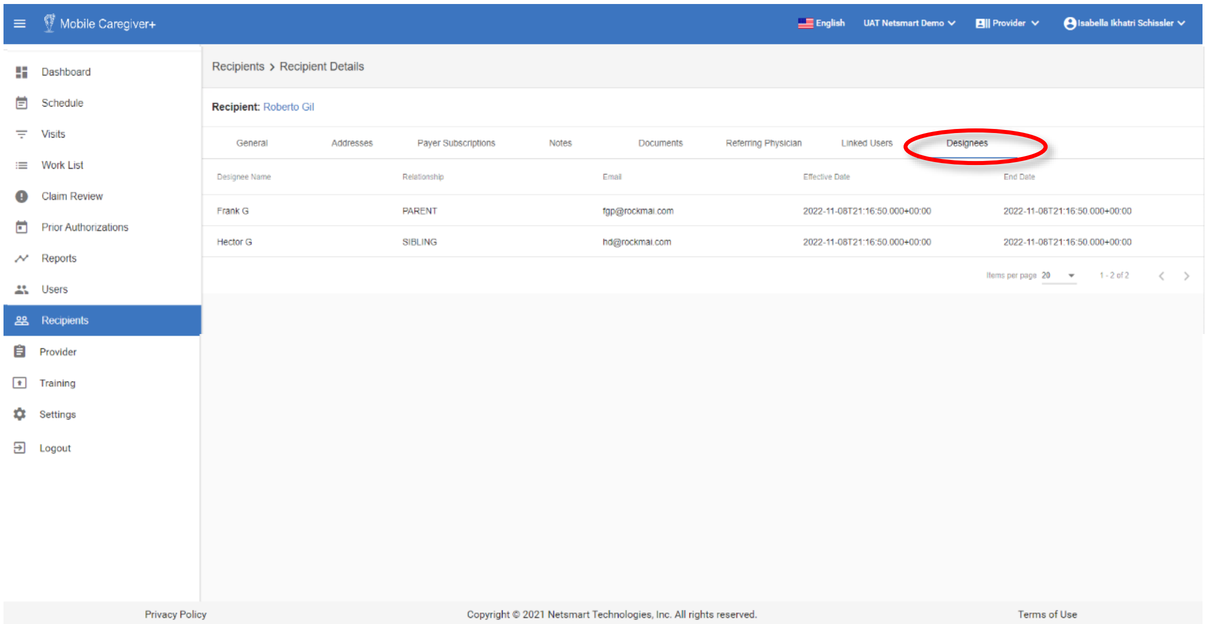


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient that you want to view designee information.

3. From the submenu, click **Details.**

   The system will automatically display the General tab of the Recipient Details screen.

4. Click on the **Designees** tab.



All active and inactive designees' information will display. The information includes the first and last name, the relationship, the email, effective date, and end date.

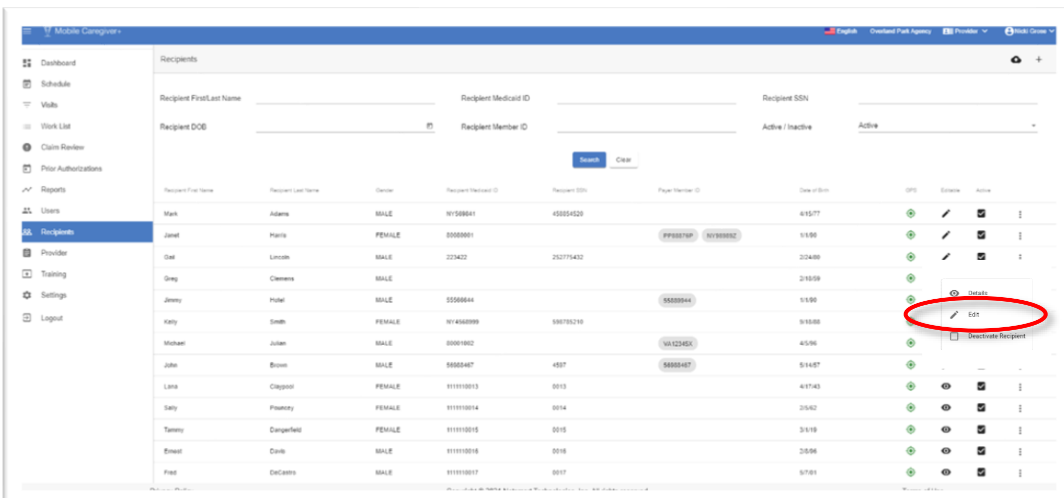
Editing a Recipient

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > Editing a Recipient

Depending on the Payers and Programs Recipient are enrolled in, some providers may have limited access rights to update profile data for Recipients that are automatically loaded into Mobile Caregiver+ Portal, such as adding additional address, while other providers may be allowed to manually add and modify all Recipient data.

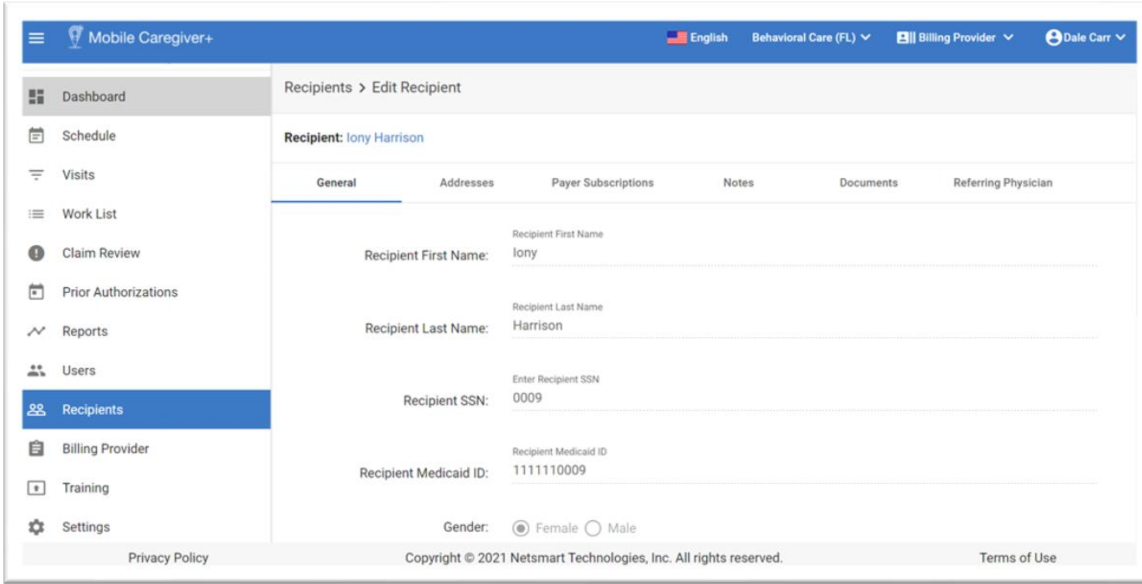
To update a Recipient's profile data:

1. From the Main Menu, click **Recipients.**



2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

   The system will display the Edit Recipient screen.



4. From the Edit Recipient screen, providers can edit one of more of the following:

Edit Recipient Tab	Editable Profile Detail(s)
General	Recipient's demographic and emergency contact information.
Address	All providers will be able to add, remove, and manage Recipient's list of address(es).
Payer Subscriptions	Review Payer(s) information and edit Recipient's Diagnosis Code(s). ****Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; Recipients' Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile.****
Notes	Add notes to Recipient's EVV record and review Caregivers' notes – Recipient notes can be viewed by Caregivers.
Documents	Add Documents to Recipient's EVV record – Recipient document(s) can be viewed by Caregivers.
Referring Physician	Add and manage the Recipient's list of referring physicians.

Updating Recipient's General Recipient Information

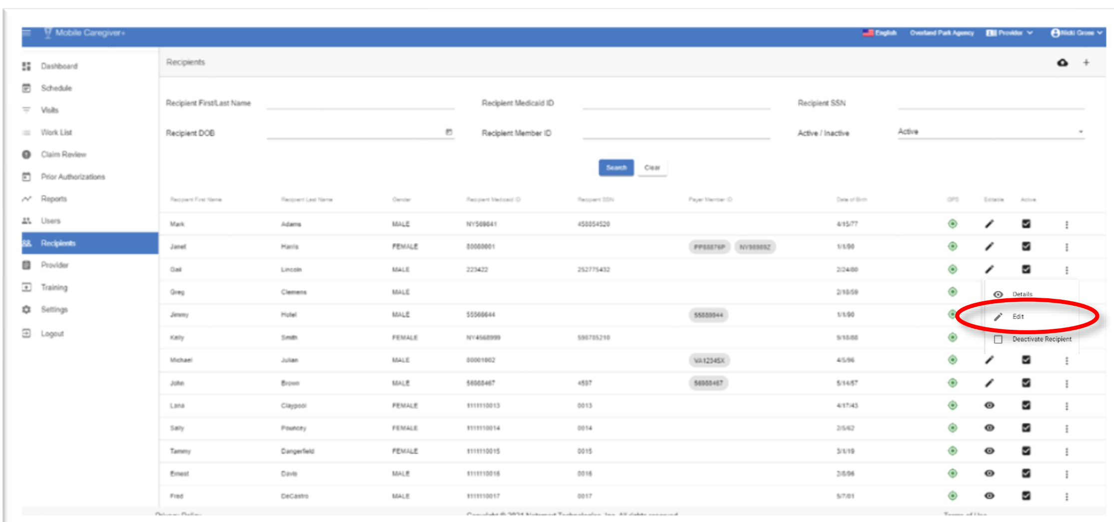
You are here: Mobile Caregiver+ Provider Portal User Guide > Managing Recipients > Editing a Recipient > Updating Recipient's General Information

The General tab displays the Recipient's basic information and emergency contact information.

Depending on the Payers and Programs Recipients are enrolled in, some providers may have limited access rights to update demographic data for Recipients that are automatically loaded into Mobile Caregiver+ Portal, while other providers may be allowed to manually add and modify all Recipient data. All providers will have access rights to add and edit Recipient emergency contact information.

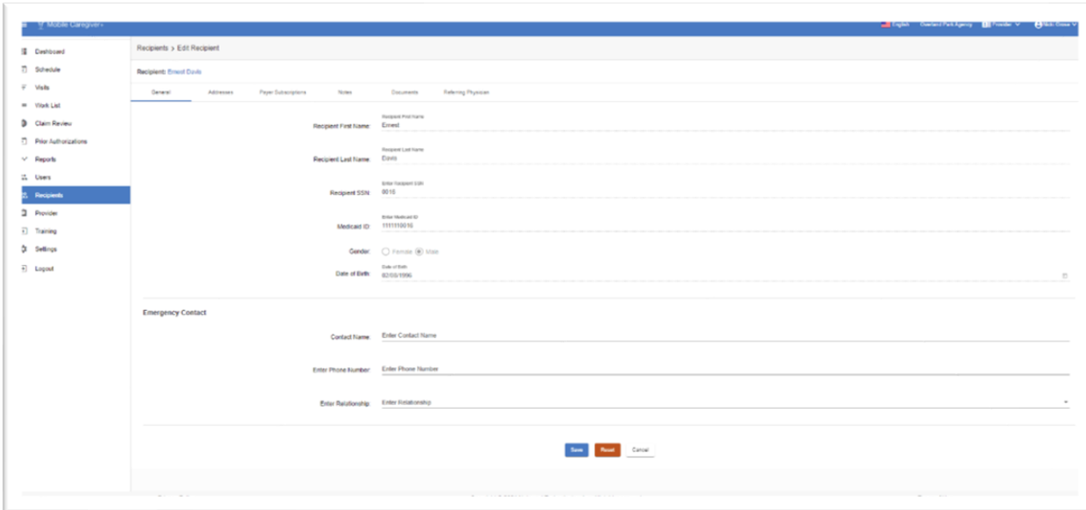
To update a Recipient's general information:

1. From the Main Menu, click **Recipients**.



2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

   The system will automatically display the General tab of the Edit Recipient screen.



Depending on the Payer Recipients are enrolled with, some providers may be able to edit the following demographic data for the Recipient's:

- Recipient First Name
- Recipient Last Name
- Recipient SSN
- Recipient Medicaid ID
- Gender
- Date of Birth

All providers will have access rights to add and the following Recipient's emergency contact information:

- Contact Name
- Phone Number
- Relationship

4. Scroll to the bottom of the tab and click **Save** to save any changes

   Click **Reset** to clear all changes.

Related Topics:

- Searching for and Viewing Recipients
- Adding a New Recipient
- Editing a Recipient

Updating Addresses

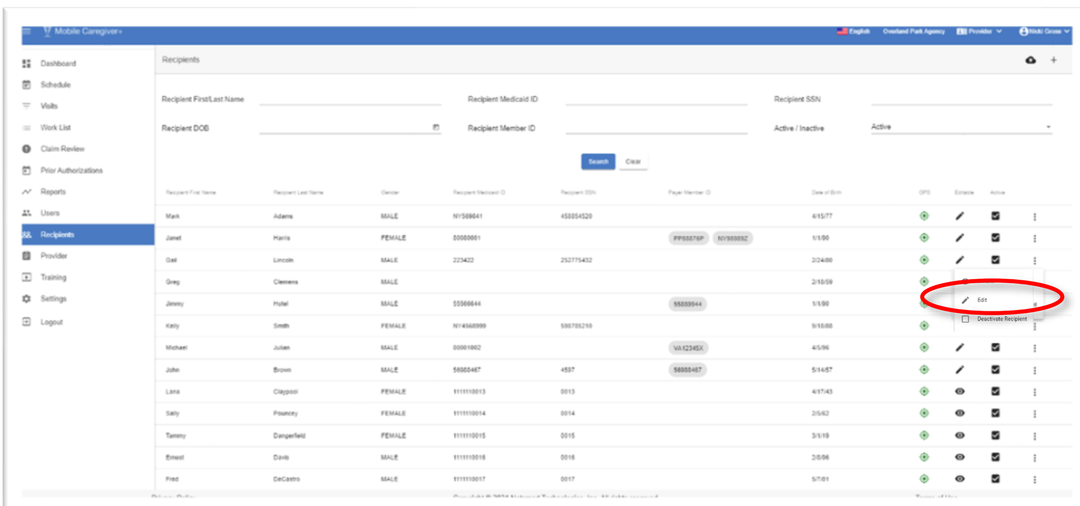
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > Updating Addresses

All addresses on file for the Recipient are listed on Address tab. The yellow star indicates the primary address.

All providers will have access rights to add a new address, and to edit Recipient address information.

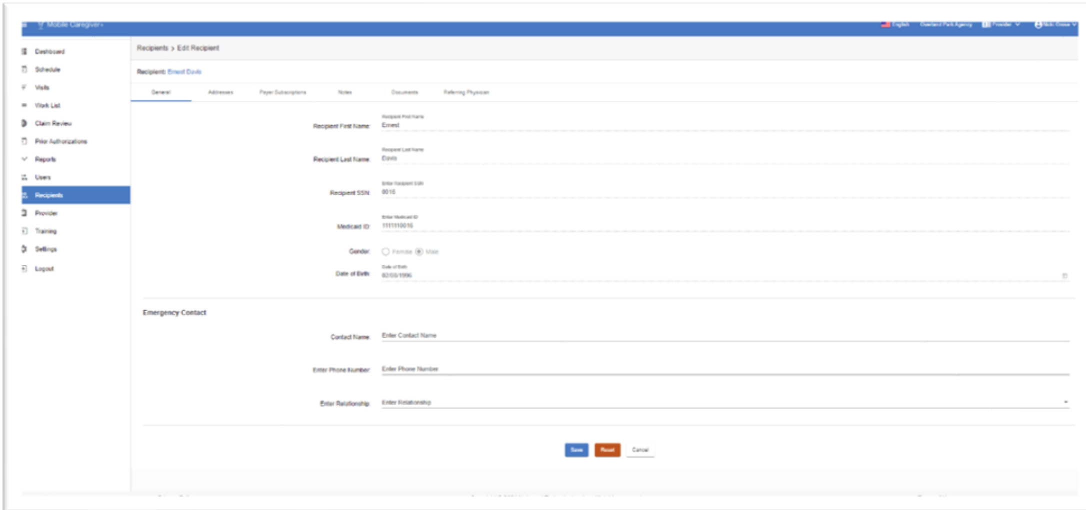
To update the address information for a Recipient:

1. From the Main Menu, click **Recipients**.

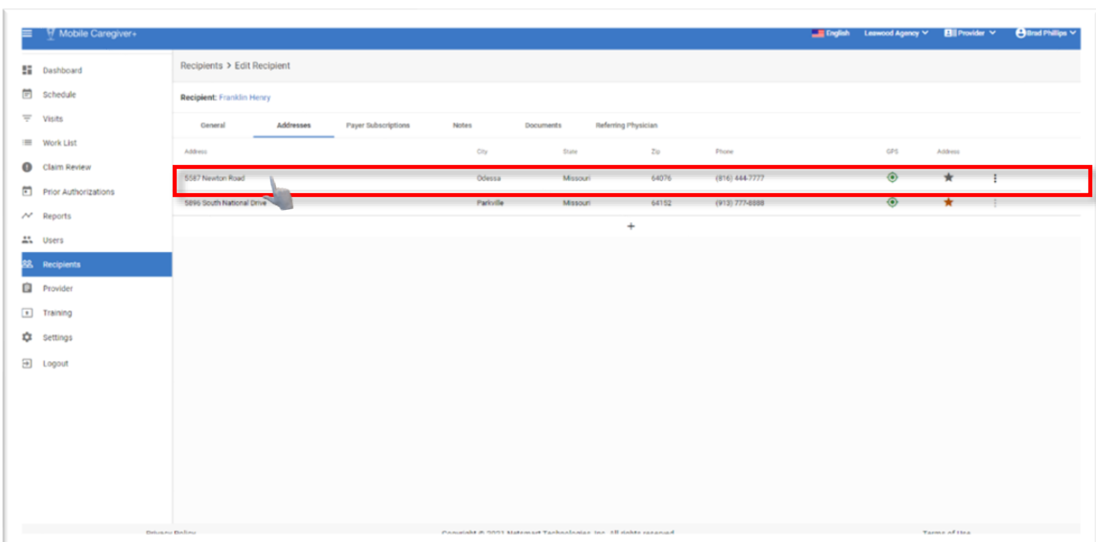


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

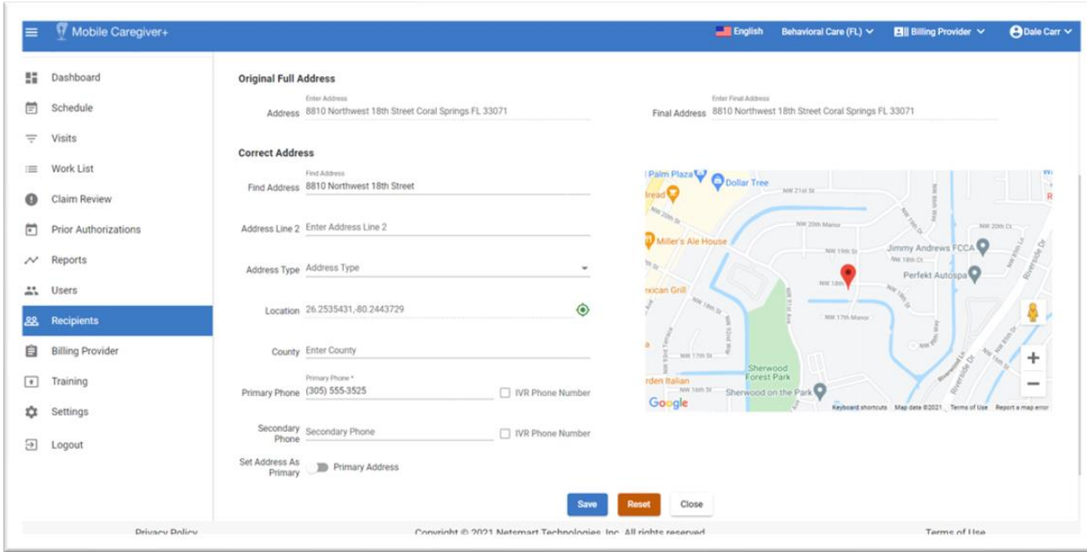
   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the **Addresses** tab.



5. Click on the address that you want to update.



6. Edit the Recipient’s address.

   If you are updating the address, be sure to start typing the address in the **Find Address** field – the system will display a list of matching validated Google Maps addresses.

   i. Select the correct address from the list.

      Note: If the address you are entering is not found in Google Maps, open another browser window, and use Google to search for the address (to see how it appears in their database). For example, Google may have NE as Northeast or vice-versa, or Lakepoint as Lake Point or vice-versa.

   ii. Select the **Address Type –** it is important that providers select an Address Type (Place of Service) to ensure compliance with Payer rules that require services to be rendered at designated locations.

   iii. Edit the Recipient’s **Primary Phone –** You are required to enter the Recipient’s phone number.

   iv. Click the **Set as Primary** switch, to set the current address as the primary address.

   v. Edit any other optional data.

7. Scroll to the bottom of the tab and click **Save** to save any changes

   Click **Reset** to clear all changes.

Adding a New Address

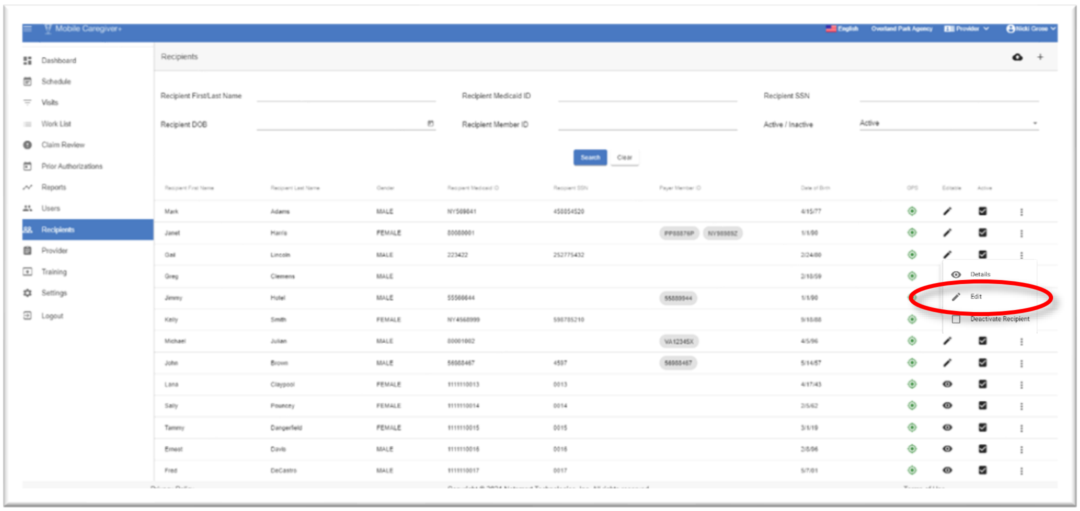
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Adding a New Address

All addresses on file for the Recipient are listed on Address tab. The yellow star indicates the primary address.

All providers will have access rights to add new addresses, and to edit Recipient address information.

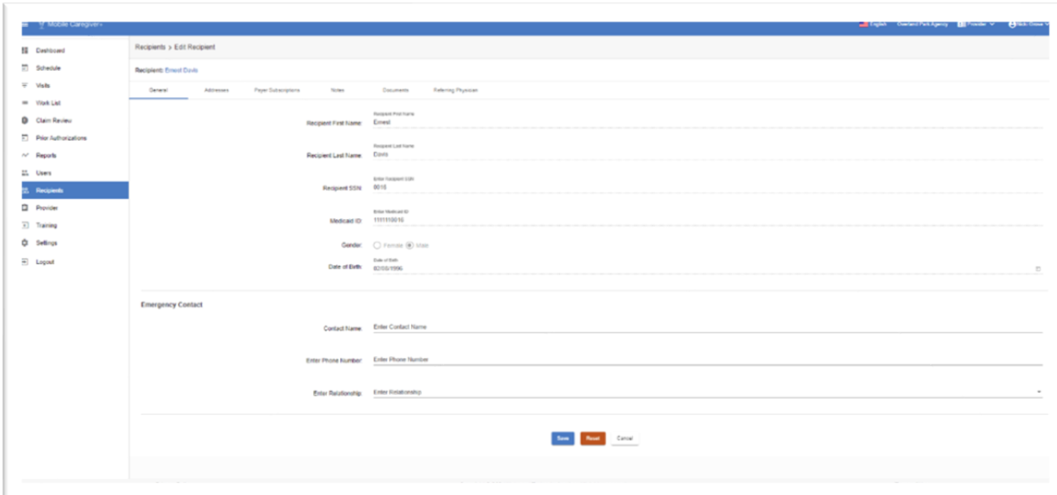
To add a new for a Recipient:

1. From the Main Menu, click **Recipients**.

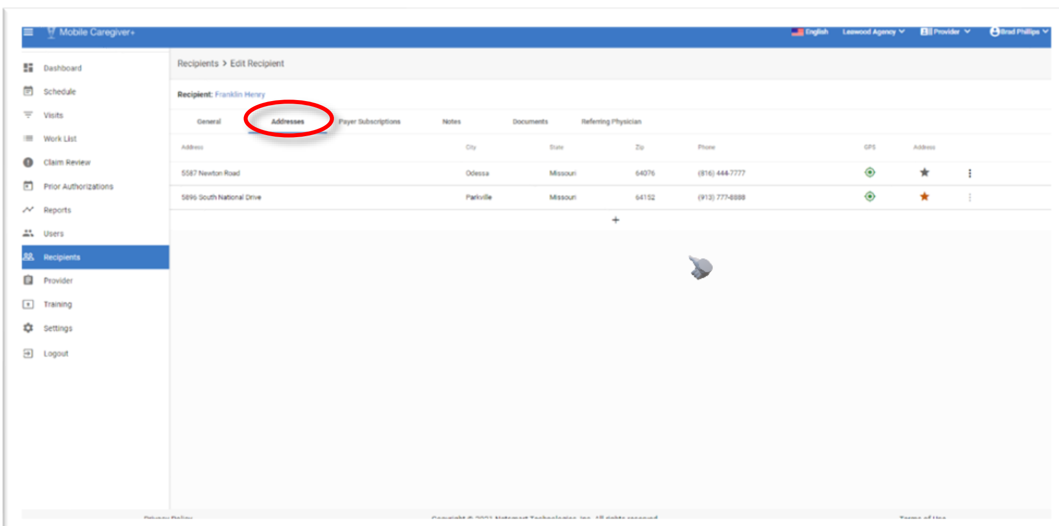


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

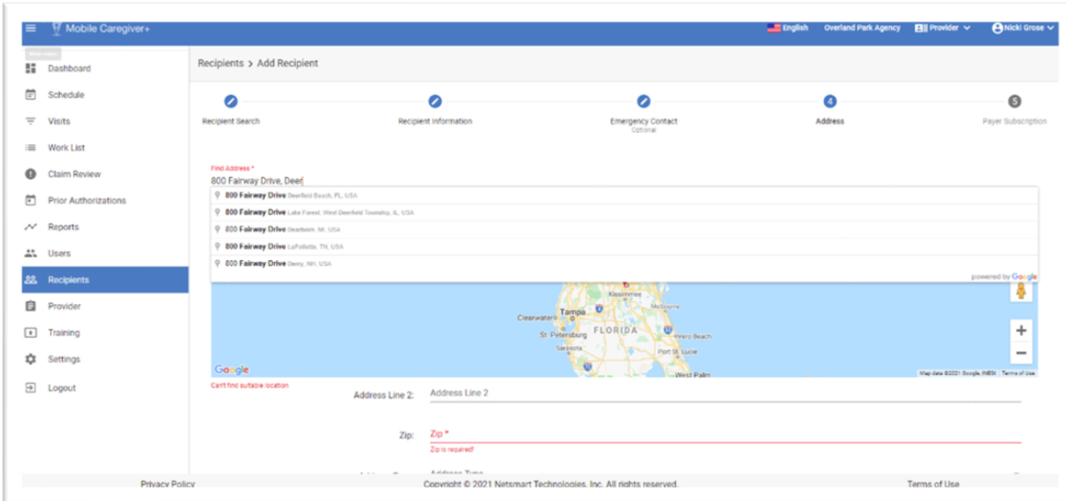
   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the **Addresses** tab.



5. Click on the **Add New Address** icon, + .



6. Enter the Recipient's address information.

   Be sure to start typing the Recipient's address in the **Find Address** field – the system will display a list of matching validated Google Maps addresses.

   i. Select the correct address from the list.
      Note: If the address you are entering is not found in Google Maps, open another browser window, and use Google to search for the address (to see how it appears in their database). For example, Google may have NE as North East or vice-versa, or Lakepoint as Lake Point or vice-versa.

   ii. Select the **Address Type –** it is important that providers select an Address Type (Place of Service) to ensure compliance with Payer rules that require services be rendered at designated locations.

   iii. Enter the Recipient's **Primary Phone –** You are required to enter the Recipient's phone number.

   iv. Enter any other optional data.

7. Click **Save** when you finish making your entries, or, to clear your entries, click **Reset**.

Related Topics:

- Searching for and Viewing Recipients
- Adding a New Recipient
- Editing a Recipient
- Uploading Documents for a Recipient

- *Deactivating a Recipient*
- *Sending a Message to a User*
- *Resetting User Passwords*
- *Activating an Inactive Recipient*

Editing User Roles

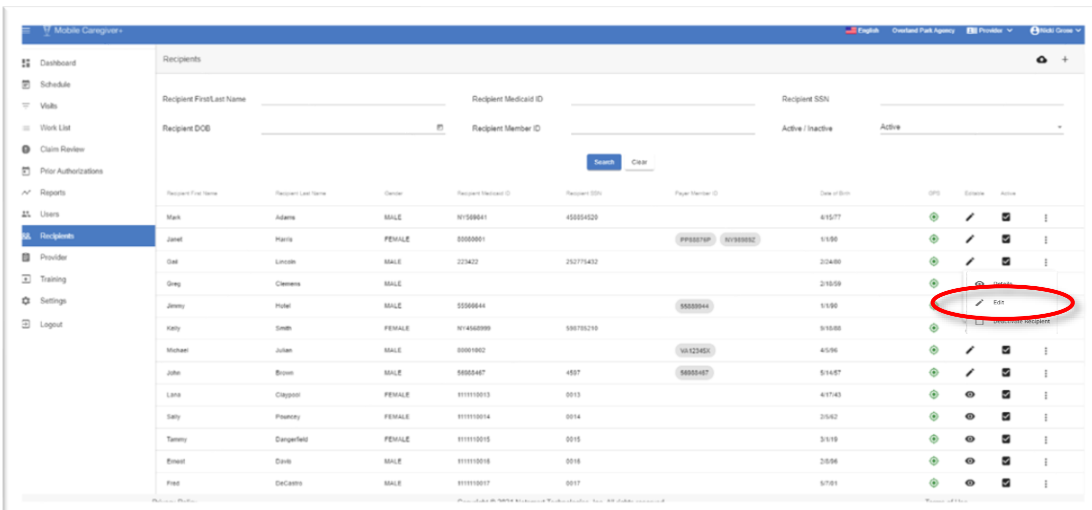
Changing Recipient’s Primary Address

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Setting an Address as Primary

The system will automatically enter the primary address as the start and end address for visit that are being added for a Recipient.

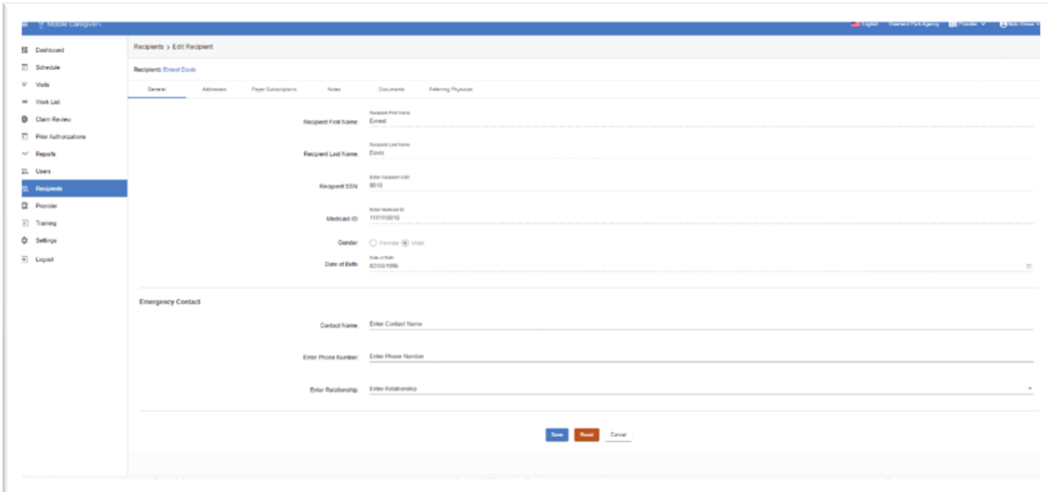
To set an address as the primary address for a Recipient:

1. From the Main Menu, click **Recipients**.

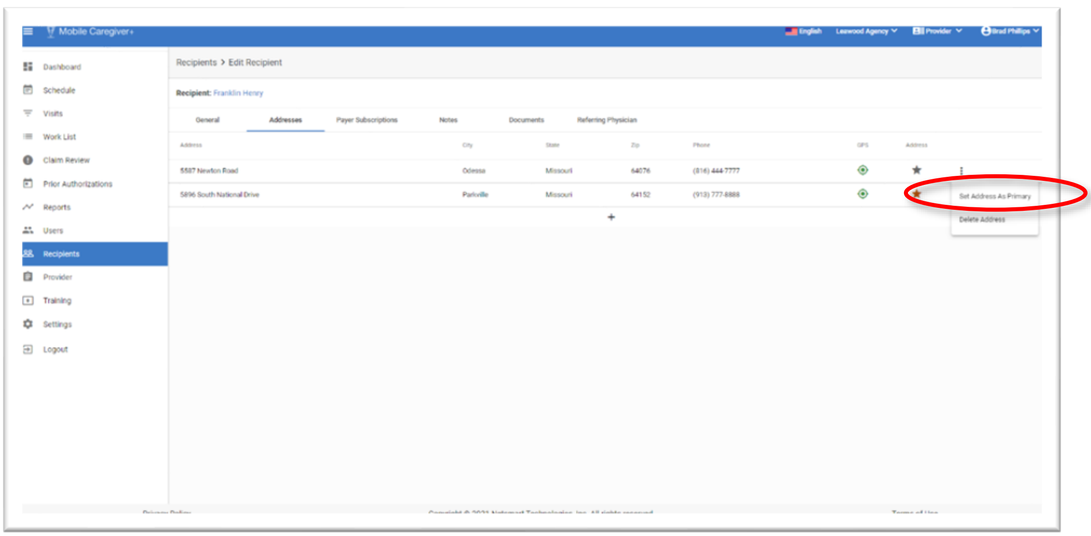


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the **Addresses** tab.



5. Click on the **Actions** icon, ⋮, for the address you want to set as primary.

6. From the shortcut submenu, click **Set Address as Primary**.

Related Topics:

- Searching for and Viewing Recipients
- Adding a New Recipient
- Editing a Recipient
- Uploading Documents for a Recipient
- Deactivating a Recipient
- Activating an Inactive Recipient

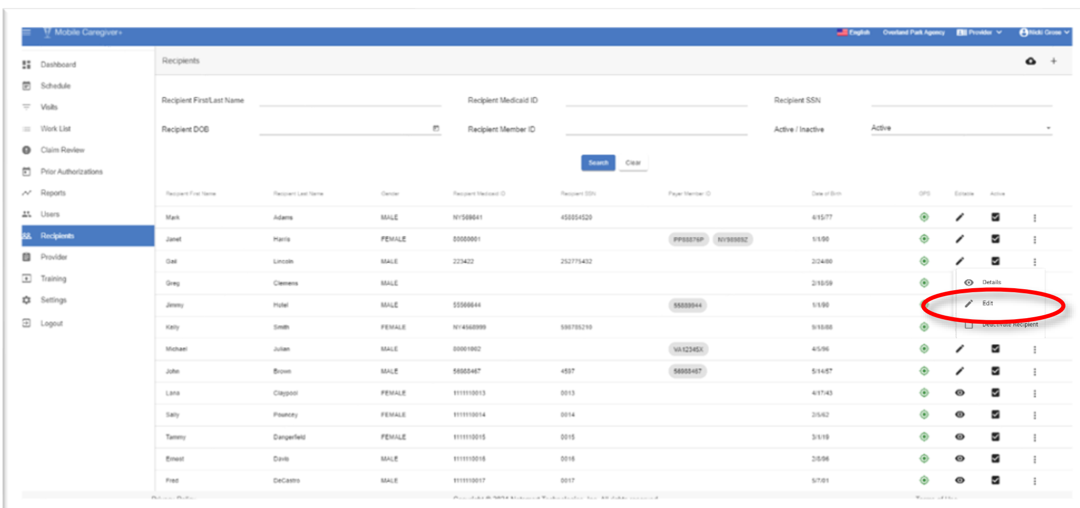
Deleting an Address

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Addresses* > Deleting an Address

Provider will be able to delete the old address from a Recipient's Mobile Caregiver+ profile.

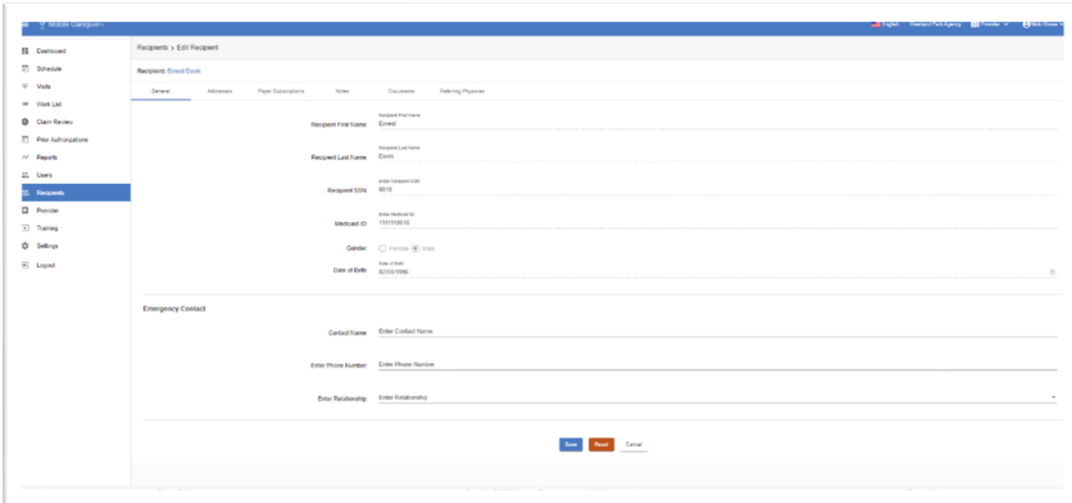
To delete an address:

1. From the Main Menu, click **Recipients**.

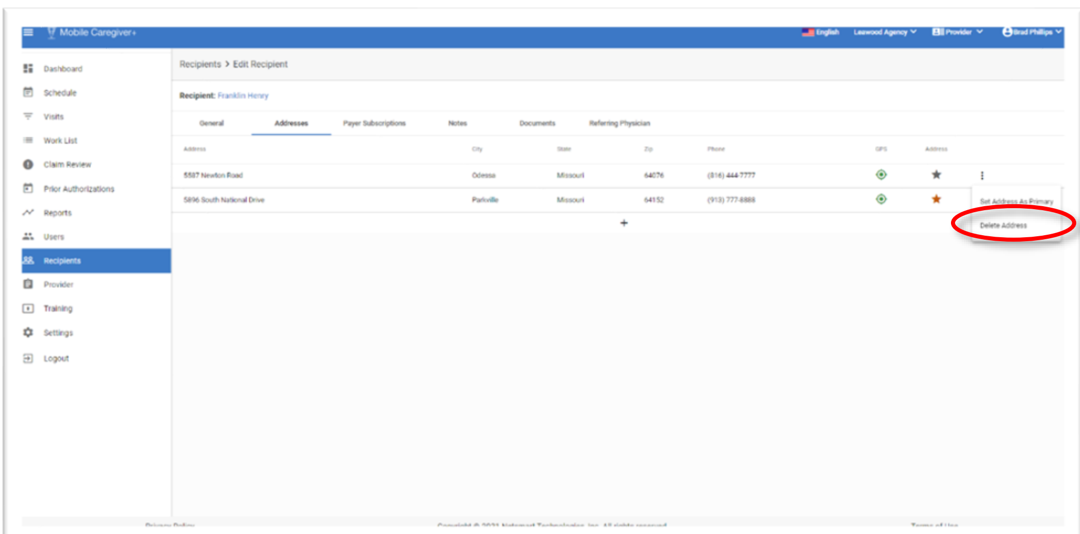


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the **Addresses** tab.



5. Click on the **Actions** icon, ⋮, for the address you want to delete.
6. From the shortcut submenu, click **Delete Address**.

Related Topics:

- Searching for and Viewing Recipients
- Adding a New Recipient
- Editing a Recipient
- Uploading Documents for a Recipient
- Deactivating a Recipient
- Activating an Inactive Recipient

Adding New Payer Subscriptions (User to contact Netsmart customer service)

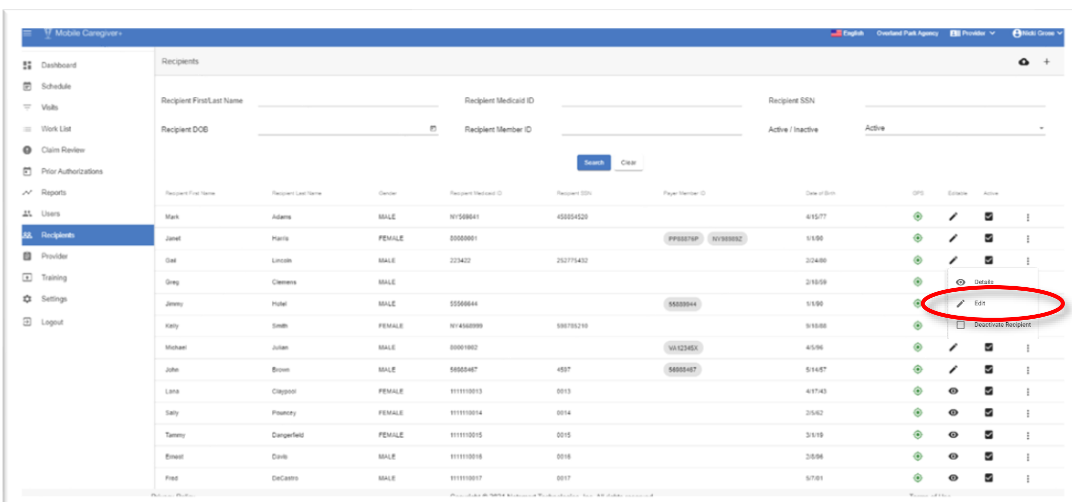
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > Adding New Payer Subscription

The Payer Subscriptions tab displays and lists all Payers the Recipient is enrolled with. From the Payer Subscriptions tab, providers can:

- *Add a new payer*
- *Delete a payer*
- *Add a Payer Subscription Plan*
- *Edit a Payer Subscription Plan*
- *Edit a Recipient's Diagnosis Code*

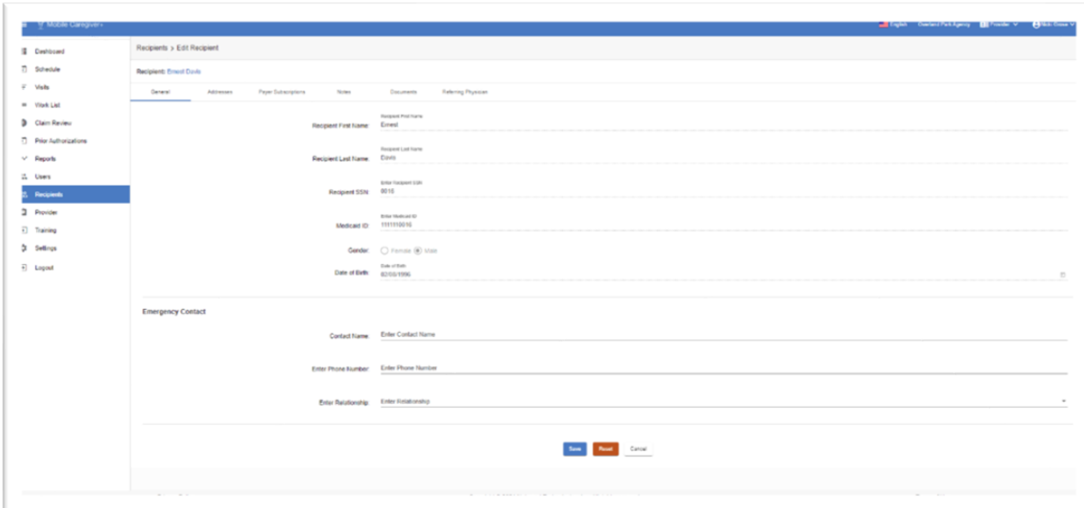
To Add a Payer Subscription:

1. From the Main Menu, click **Recipients**.

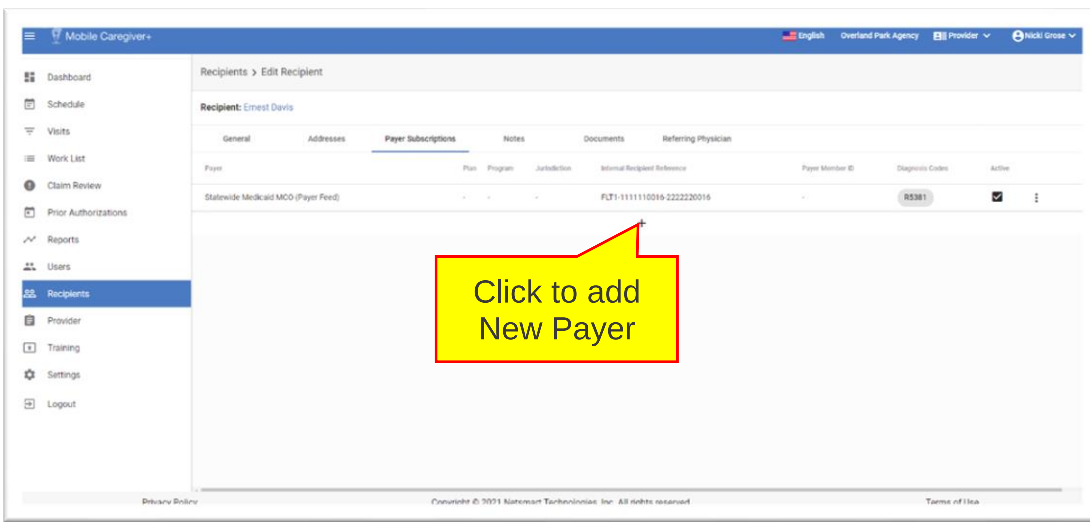


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

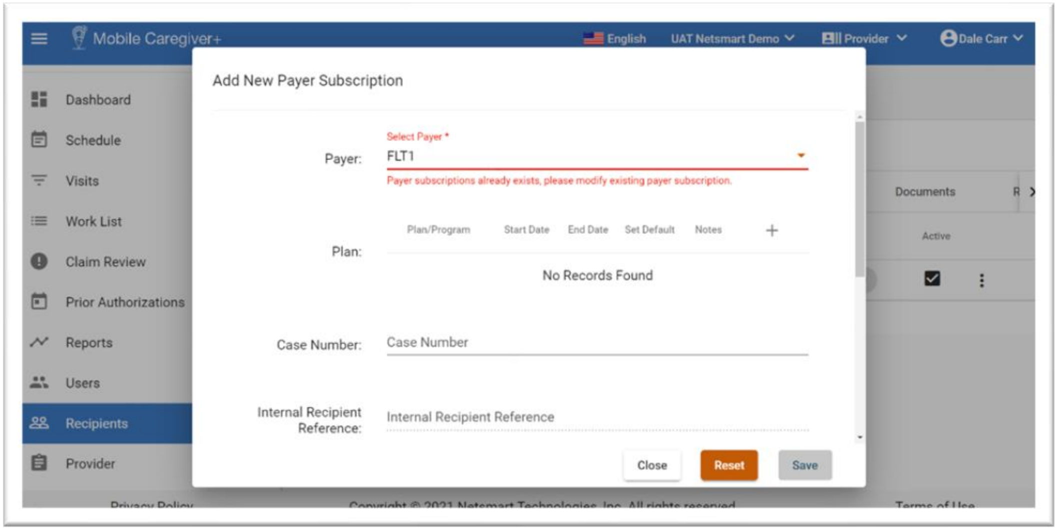
   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the Payer Subscriptions tab.



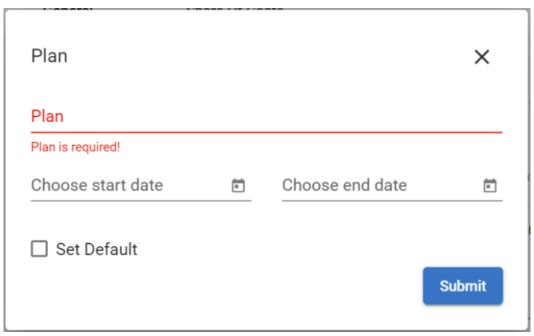
5. Click the “**Add New Payer Subscription**” icon, +, at the bottom of the list of payers to open the Add New Payer Subscription form.



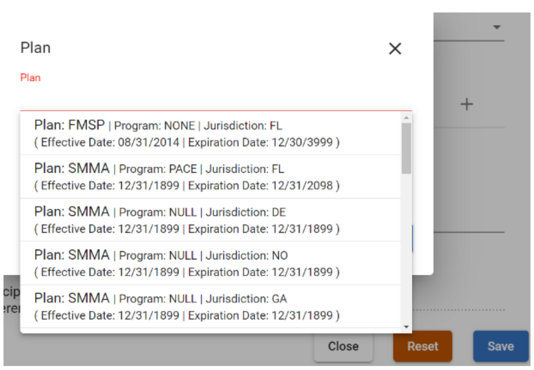
6. Click in the **Payer** field to select a payer.

Adding Payer Subscription Program/Plan

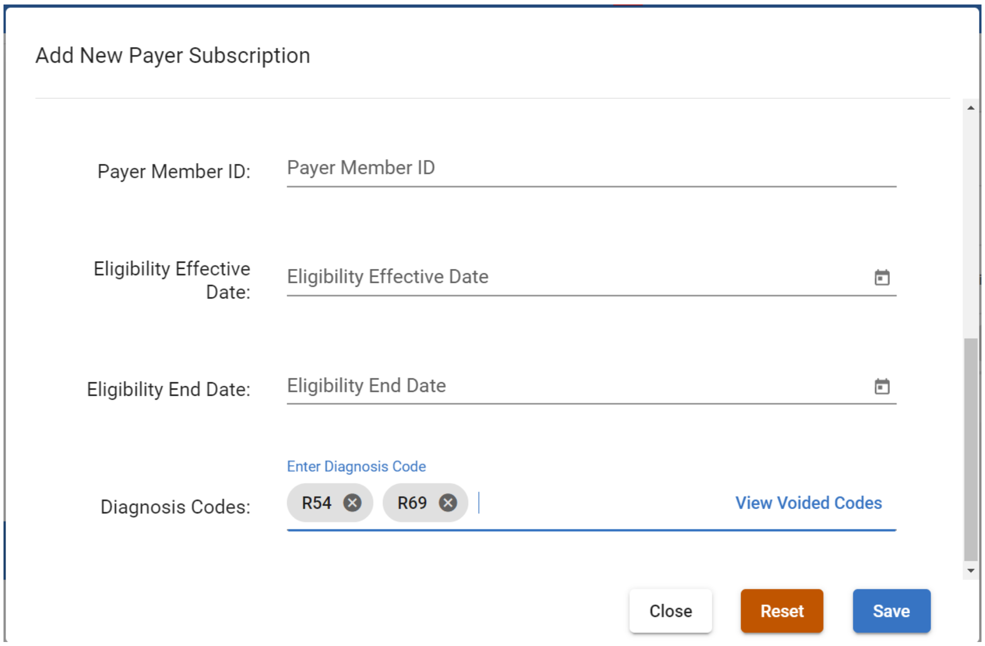
i. Click the **Select Program/Plan** icon, +, to select a program/plan that is offered by the selected payer.



ii. Click in the **Plan** field to select the Recipient's subscription plan for the selected payer.



iii. From the list, select Program/Plan you want to add to the Recipients Mobile Caregiver+ EVV profile.



7. Scroll down to the bottom of the Add New Payer Subscription form and enter the Recipients Primary Billing Diagnosis and any secondary codes.

   Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile

8. Click **Save** when you finish making your entries, or, to clear your entries, click **Reset.**

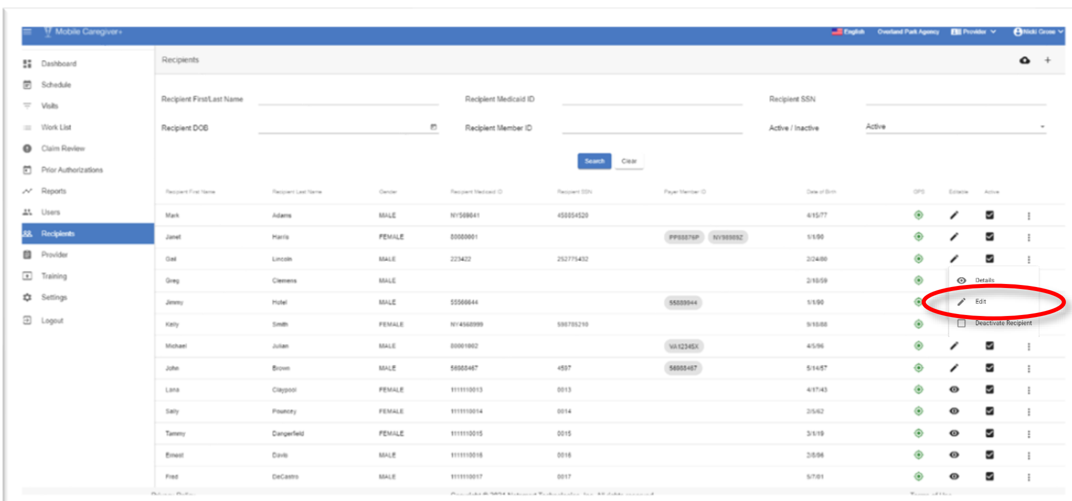
Adding Programs/Plans to Existing Payer Subscription

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > Adding New Payer Subscription Plan

Depending on the Payer, some Recipient may be enrolled in multiple Programs/Plans with a single payer. The payer will upload all subscription data for Recipients that are enrolled in multiple Programs/Plans to the Mobile Caregiver+ Provider Portal . The Mobile Caregiver+ Provider Portal allows Provider Admins to select and configure a Recipient's Mobile Caregiver+ EVV profile with multiple Programs/Plans enrollments for a single payer.

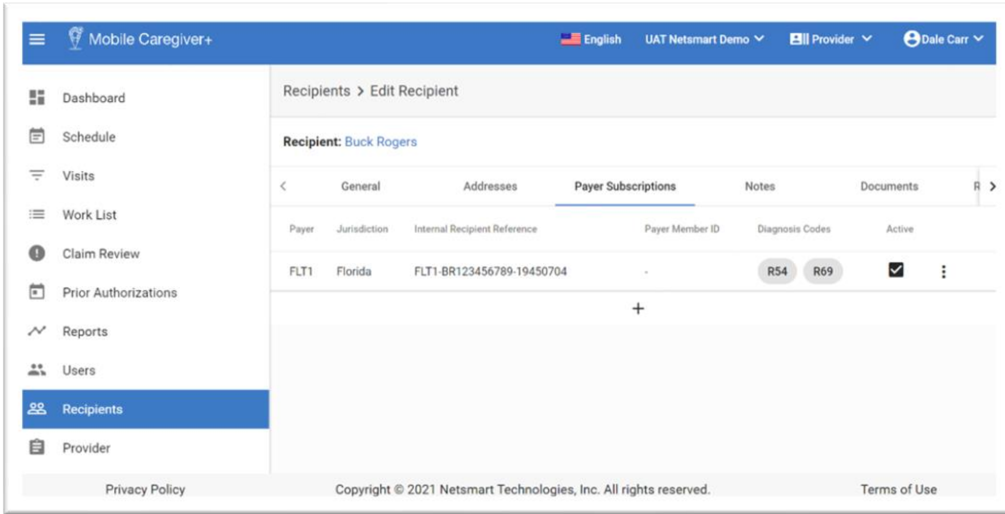
To add a Program/Plan to an existing Payer Subscription:

1. From the Main Menu, click **Recipients**.

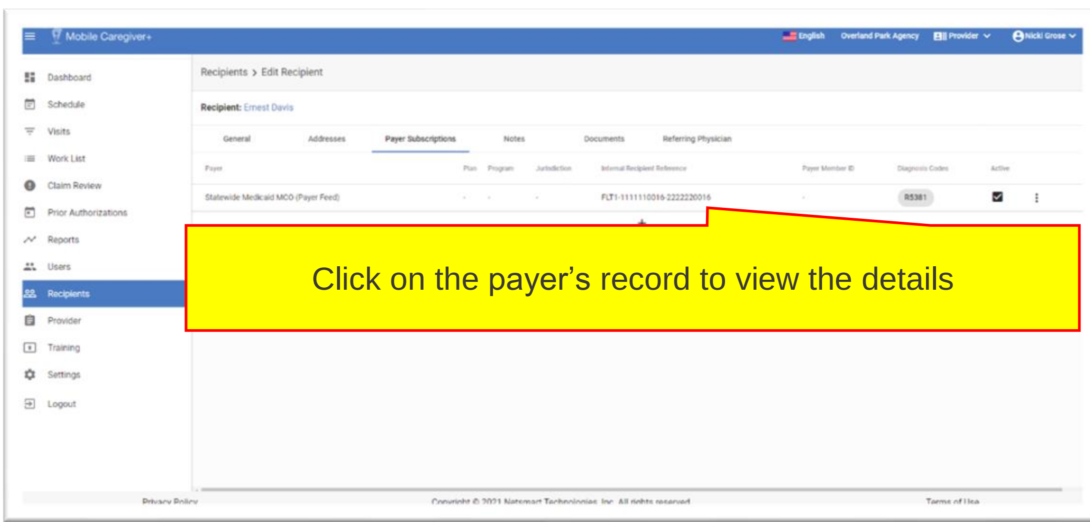


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

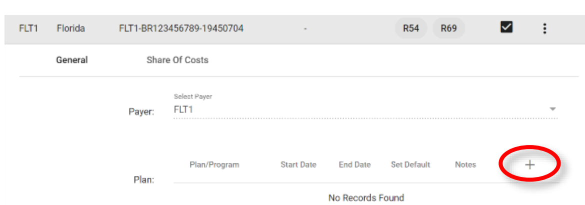
   The system will automatically display the General tab of the Edit Recipient screen.



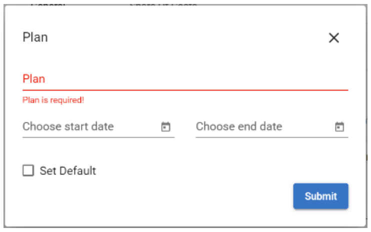
4. Click on the Payer Subscriptions tab.



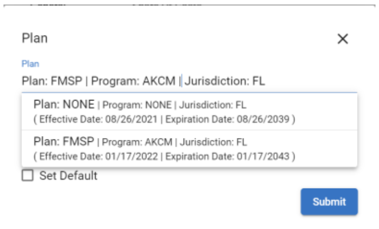
5. Click on the payer's record to view the details.



6. Click on the **Select Program/Plan** icon, +, to select a program/plan that is offered by the selected payer (Providers can add multiple programs/plans that a Recipient is enrolled in with the selected payer).



7. Click in the **Plan** field to select a plan.



8. From the list, select the Program/Plan you want to add to the Recipient's Mobile Caregiver+ EVV profile.
9. Enter the start date and end date for the plan.
10. Click the blue **Submit** command.
    i. Repeat steps 6 through 10 to add any additional Program/Plan that the Recipient is enrolled in with the selected payer subscription.

Related Topics:

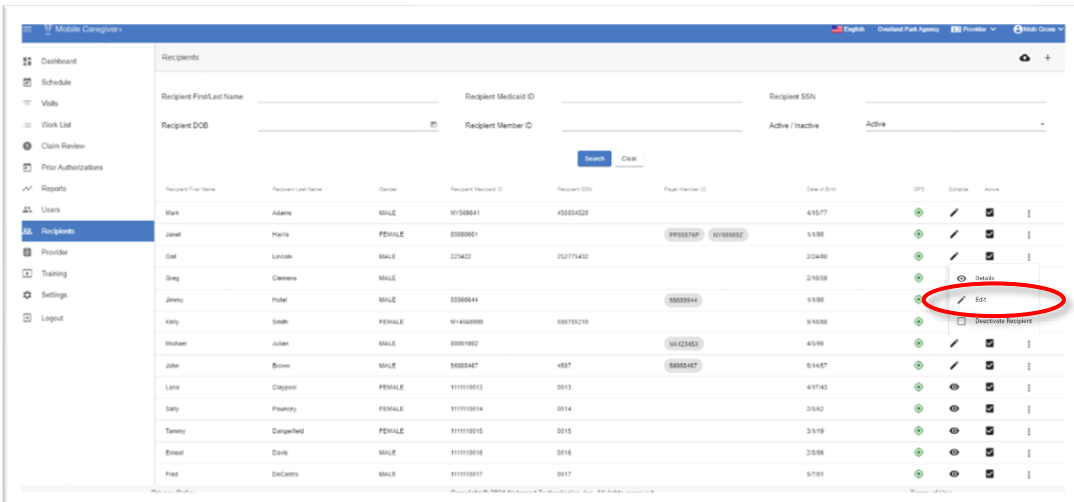
- Add a new payer
- Delete a payer
- Adding Payer Subscription Plan
- Editing Payer Subscription Plan
- Editing Diagnosis Code

Editing an Existing Payer Subscriptions (User to contact Netsmart customer service)

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > Updating Payer Subscriptions

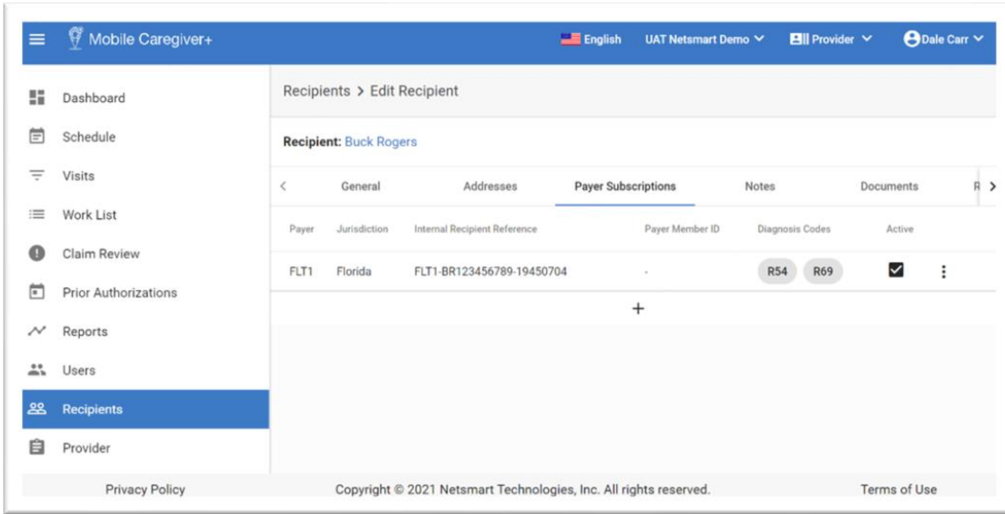
To edit an existing Payer Subscription Plan:

1. From the Main Menu, click **Recipients**.

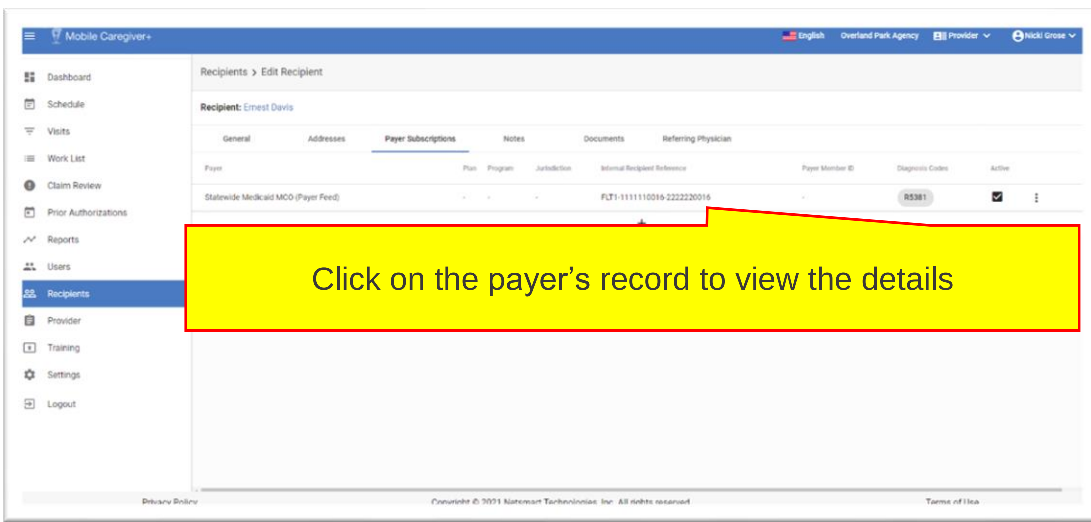


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

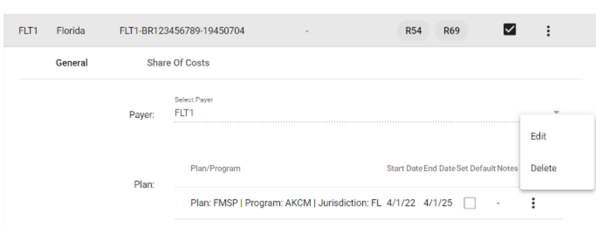
   The system will automatically display the General tab of the Edit Recipient screen.



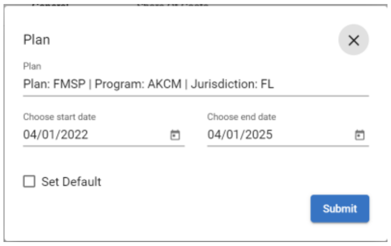
4. Click on the Payer Subscriptions tab.



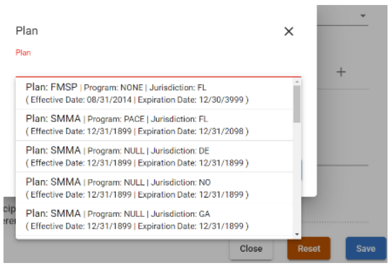
5. Click on the payer's record to view the details.



6. Click on the **Actions** icon, ⋮, for an existing Plan.
7. From the shortcut, click **Edit.**



8. Click in the **Plan** field to select a plan.



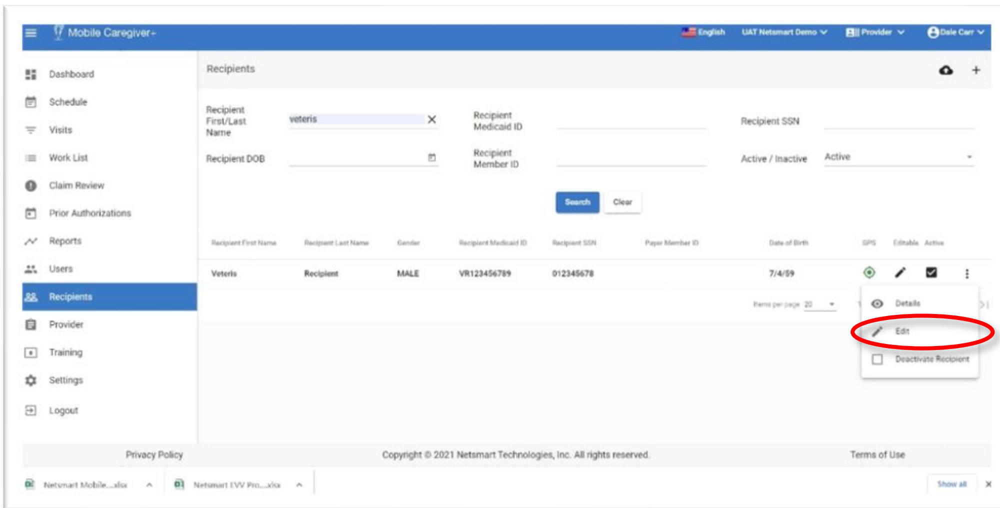
9. From the list, select the plan.
10. Enter the start date and end date for the plan.
11. Click the blue **Submit** command.

Updating a Recipient Diagnosis Code(s)

You are here: [Mobile Caregiver+ Provider Portal User Guide] > [Managing Recipients] > [Editing a Recipient] > Updating Payer Subscriptions

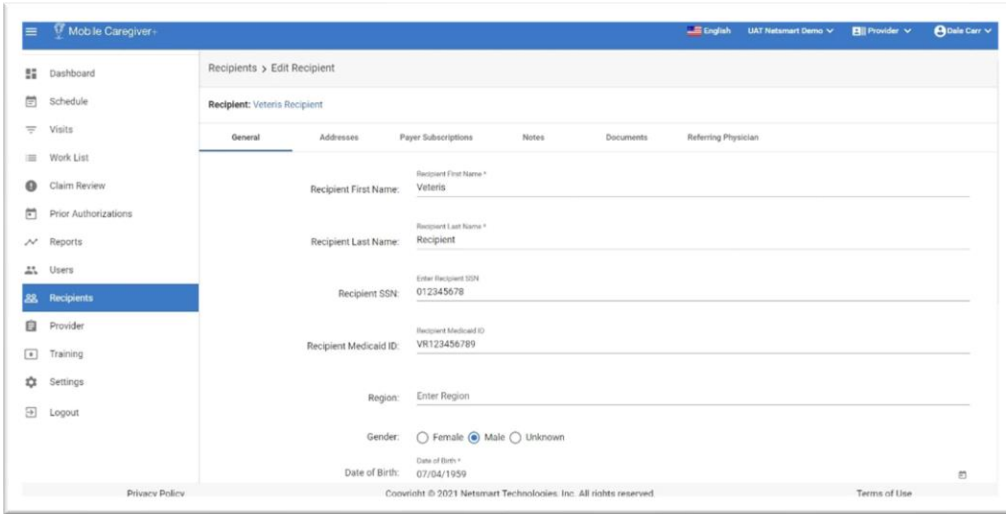
To edit a Recipient’s Diagnosis Codes:

1. From the Main Menu, click **Recipients**.

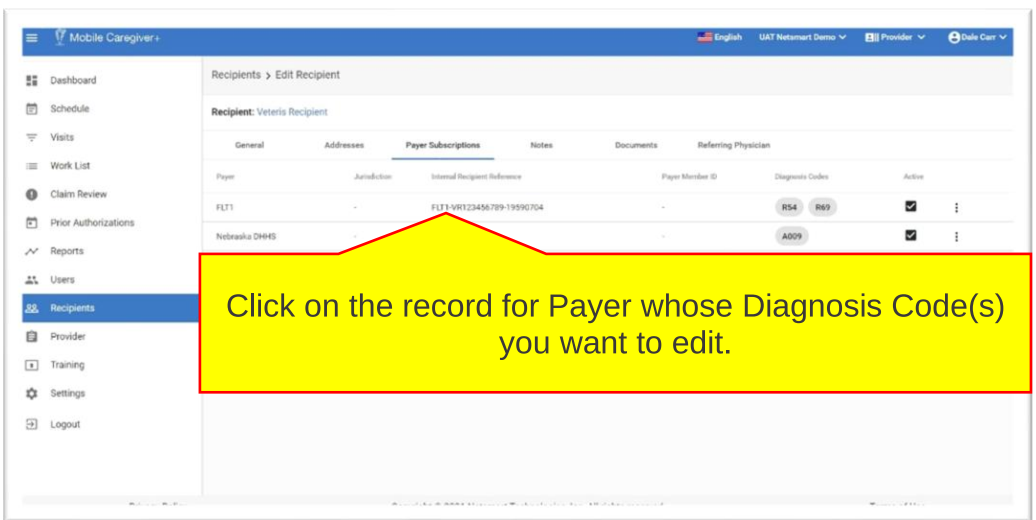


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose profile you want to edit.
3. From the shortcut submenu, click **Edit**.

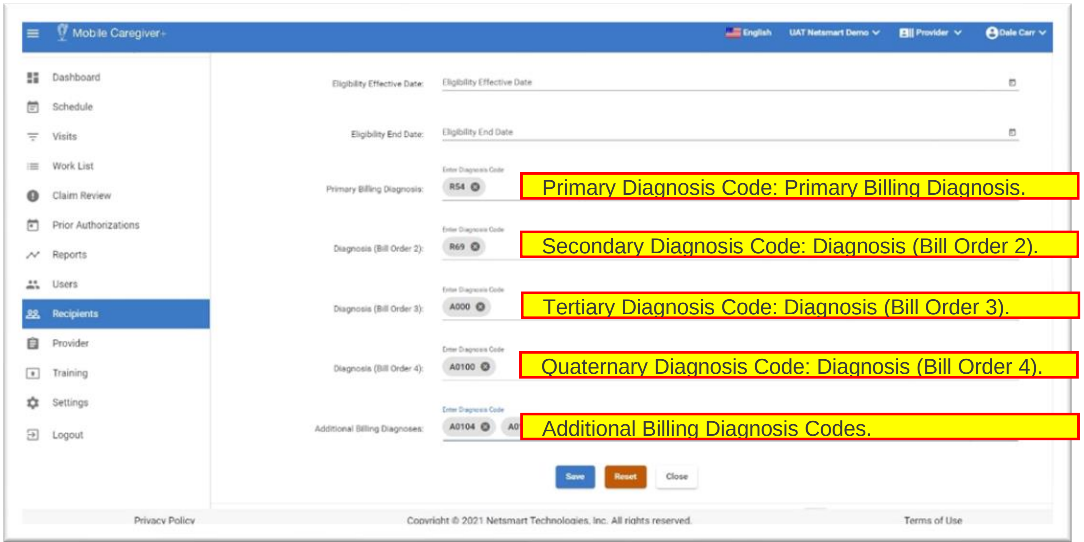
   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the Payer Subscriptions tab.



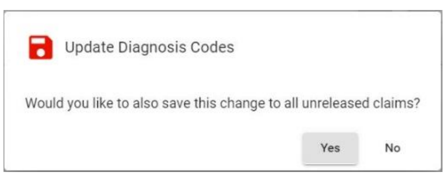
5. Click on the record for Payer that insures the Recipient, whose Diagnosis Code(s) you want to edit.



6. Enter the Recipients Primary Billing Diagnosis and any secondary codes.

   Note: The system will retain the billing sequence of Recipients' Diagnosis Codes as displayed in the Recipient's Mobile Caregiver+ profile; the Diagnosis Codes will be populated into rendered service records in the same order as they appear in the Recipient's Mobile Caregiver+ profile

7. Click **Save** when you finish making your entries, or, to clear your secondary entries, click **Reset**.



*Warning: The system will prompt you to save the change(s) "to all unreleased claims." Clicking "**Yes**" will automatically update the Diagnosis Code(s) and billing order for all unreleased service records that are currently in the Work List.*

Related Topics:

- Searching for and Viewing Recipients
- Adding a New Recipient
- Editing a Recipient
- Uploading Documents for a Recipient
- Deactivating a Recipient
- Activating an Inactive Recipient

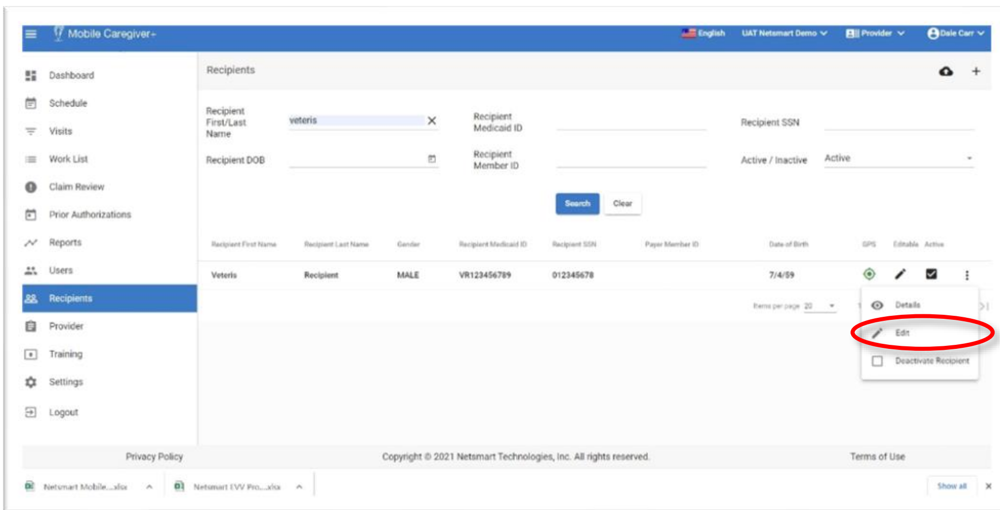
Viewing Voided Diagnosis Code(s)

You are here: [Mobile Caregiver+ Provider Portal User Guide] > [Managing Recipients] > [Editing a Recipient] > Viewing Voided Diagnosis Codes

The Mobile Caregiver+ Provider Portal will automatically void any invalid and/or non-ICD10 Diagnosis Codes that are added to a Recipient's Mobile Caregiver+ EVV profile.

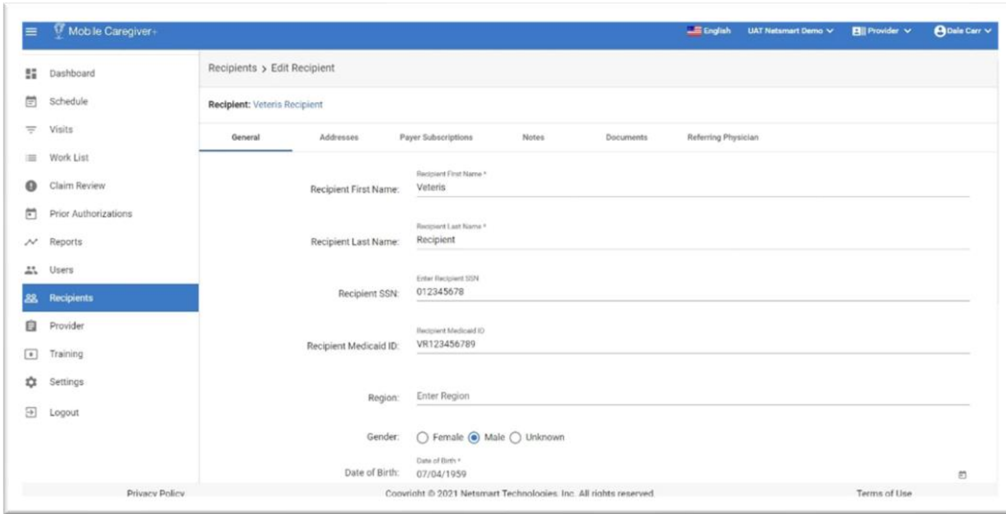
To view Diagnosis Codes that have been voided for a Recipient:

1. From the Main Menu, click **Recipients**.

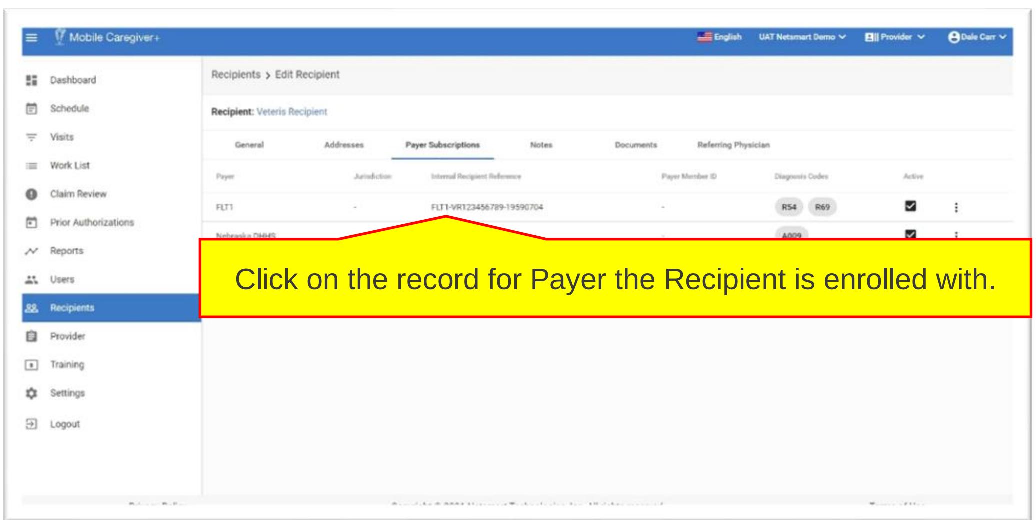


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose voided Diagnosis Codes you want to view.
3. From the shortcut submenu, click **Edit**.

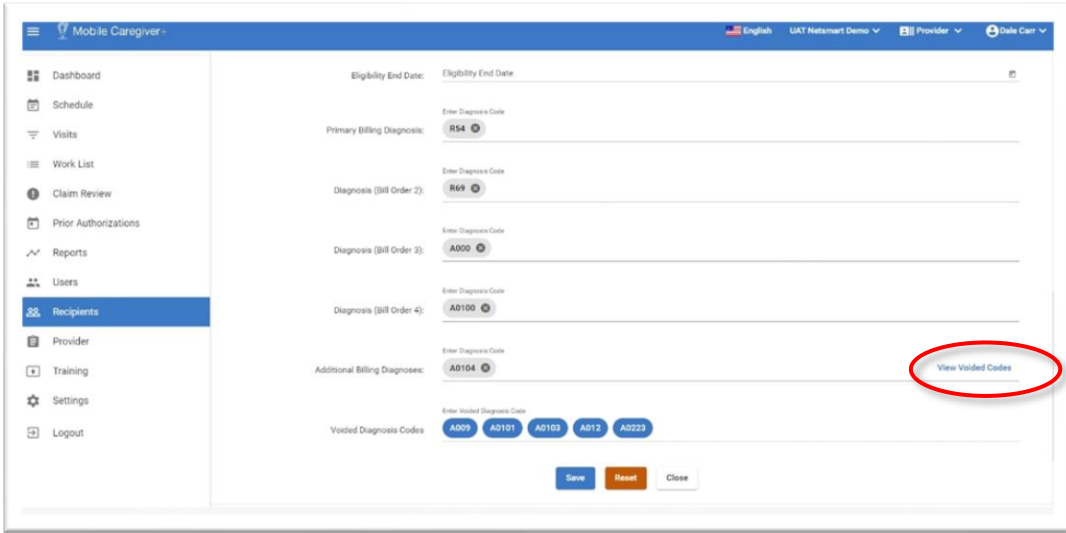
   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the Payer Subscriptions tab.



5. Click on the record for Payer's that insures the Recipient, whose voided Diagnosis Code(s) you want to view.



6. Click on the **View Voided Codes** command to view a list of invalid Diagnosis Codes that have been voided from the Recipient's MCG+ EVV profile.

Related Topics:

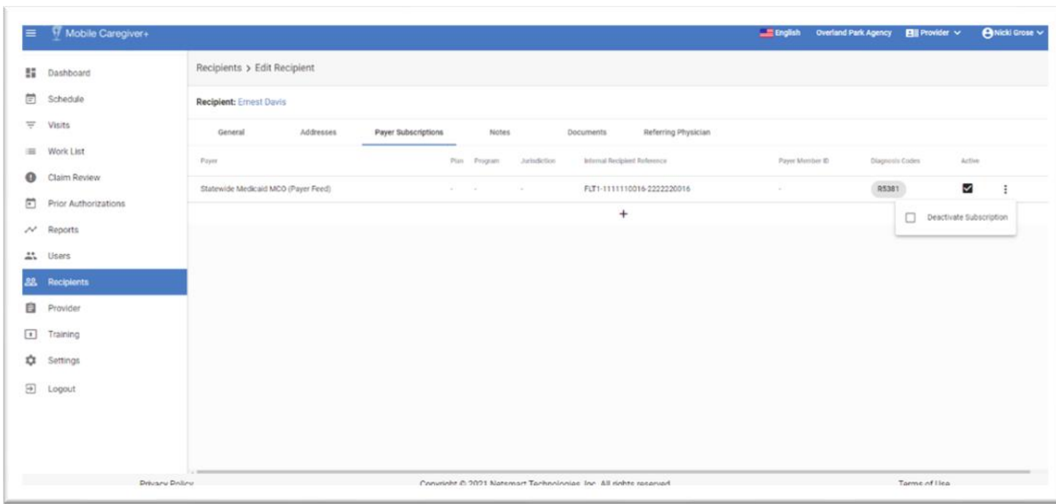
- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Deactivating a Payer (Provider must first contact Netsmart Client Service)

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > *Updating Payer Subscriptions* > Deleting a New Payer

When a Payer is no longer authorized to bill Medicaid (for example, because they did not recertify) or if your agency no longer accepts a Payer, you can delete the Payer:

1. Click the **Actions** icon, ⋮, for the payer you want to deactivate.



2. From the shortcut submenu, click the **Deactivate Subscription** checkbox, a checkmark, indicates the Payer is inactive.

Related Topics:

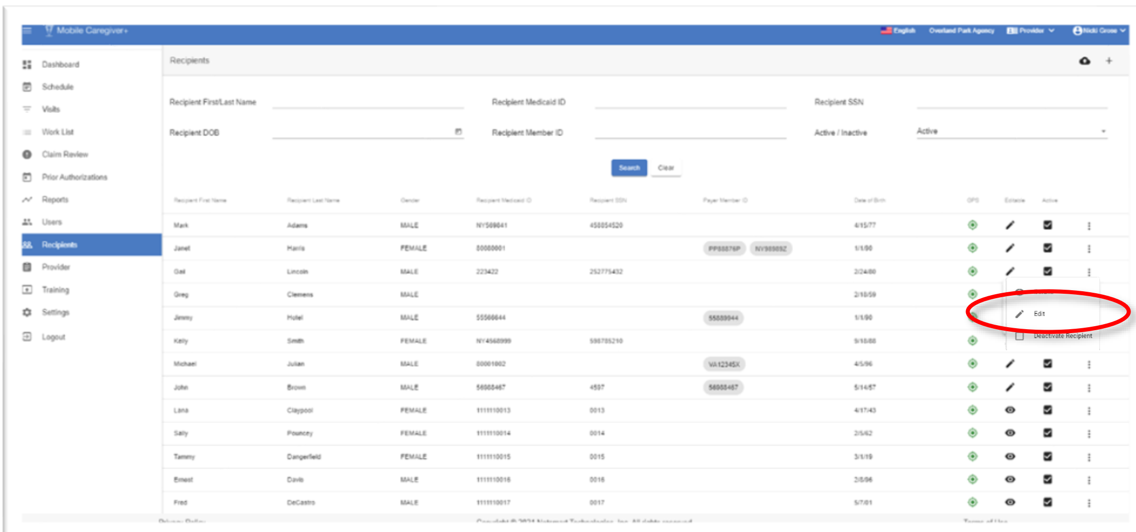
- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Entering Notes

You are here: Mobile Caregiver+ Provider Portal User Guide > Managing Recipients > Editing a Recipient > Entering Notes

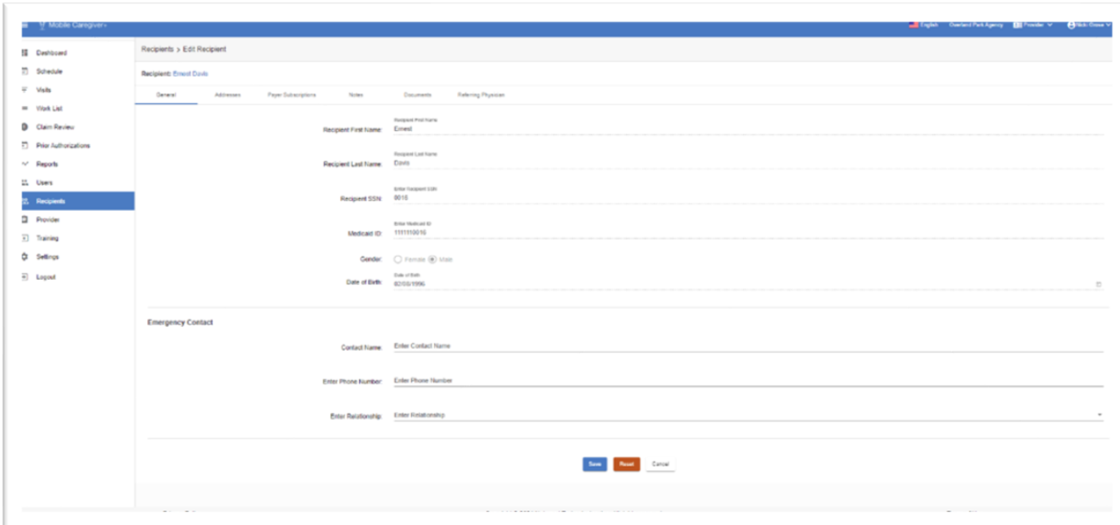
Provider Admins have can add notes to Recipient EVV records from the Provider Portal. To enter/review a Recipient's notes:

1. From the Main Menu, click **Recipients**.

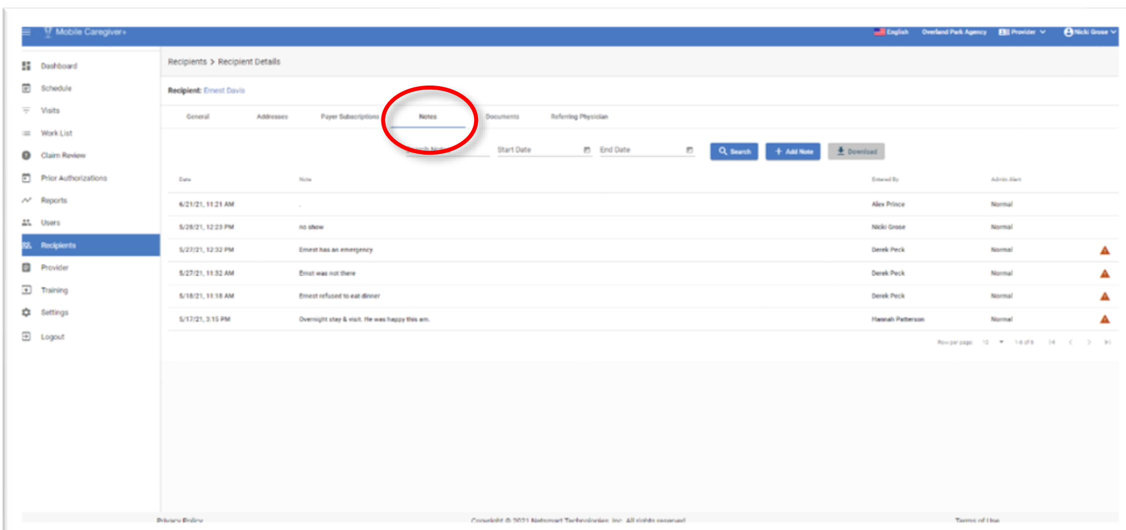


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose notes you want to edit/view.
3. From the shortcut submenu, click **Edit**.

   The system will automatically display the General tab of the Edit Recipient screen.



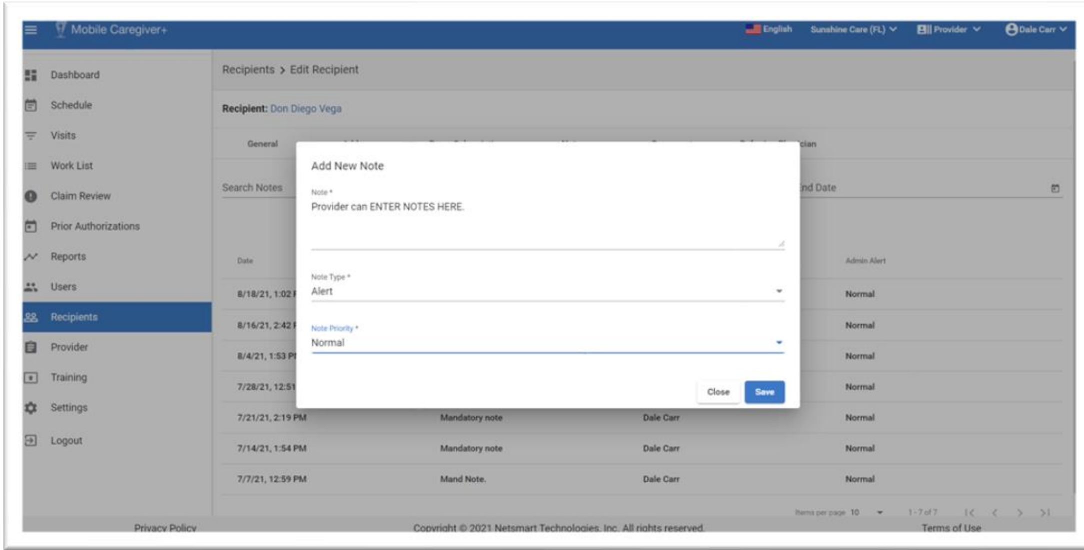
4. Click on the **Notes** tab.



Note: Notes displaying a yellow triangle, ⚠, are Caregiver notes, sent as alerts, from the Mobile Caregiver+ application.

*Provider can search/filter for note entries by keyword(s) and date range. Provide can enter keyword(s) in the **Search Notes** field and/or enter a **Start Date** and **End Date** to filter the list. Provider can sort the list by clicking any of the column headings.*

5. Click on the blue **Add Note** command to enter a new note.



6. Enter new note in the **Add New Note** dialog box.
7. Select the **Note Type.**
8. Select the **Note Priority.**
9. Click the blue **Save** command to add the new note to the Recipient's EVV record.

Related Topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

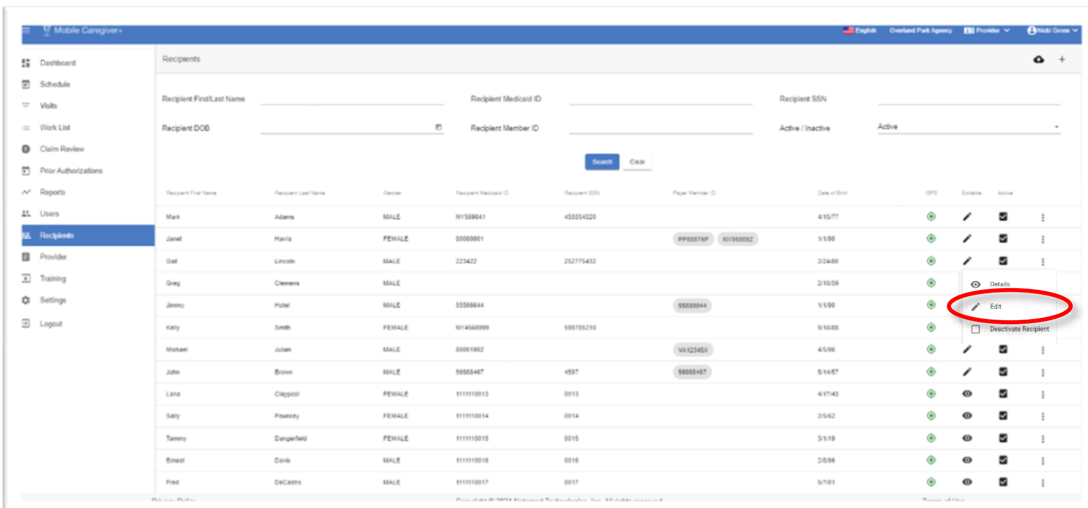
Managing Documents in a Recipient's EVV Record

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > Managing Documents in a Recipient's EVV Record

Documents can be added to Recipients EVV records on the Documents tab of the Edit Recipient screen.

To add/review documents in a Recipient's EVV record:

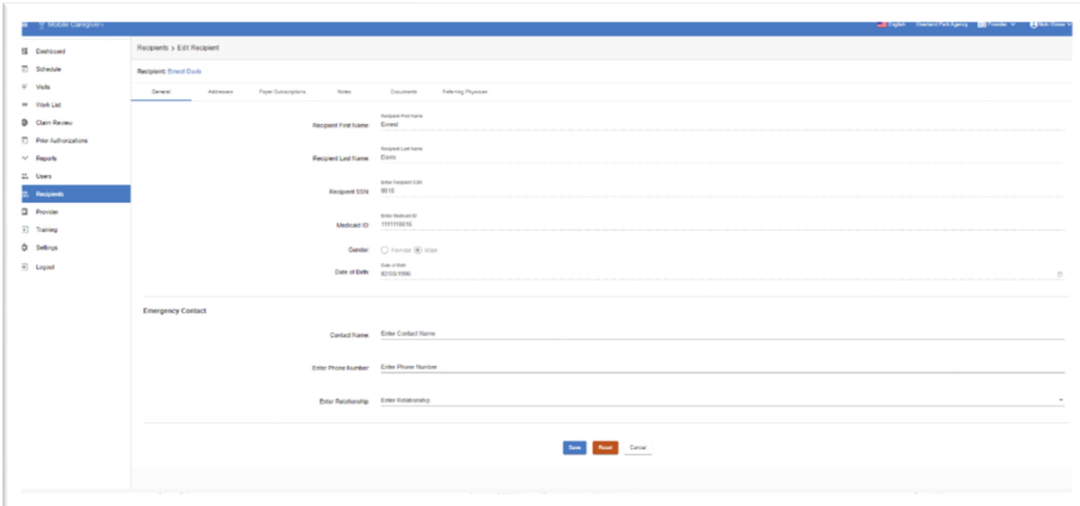
1. From the Main Menu, click **Recipients**.



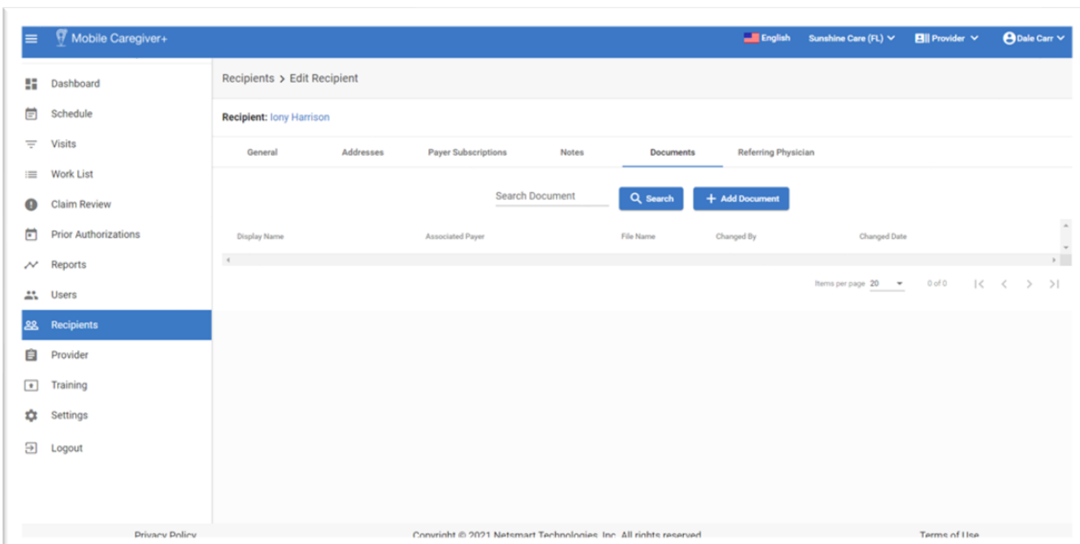
2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose notes you want to edit/view.
3. From the shortcut submenu, click **Edit**.

   The system will automatically display the General tab of the Edit Recipient screen.

Mobile Caregiver+



4. Click on the **Documents** tab.

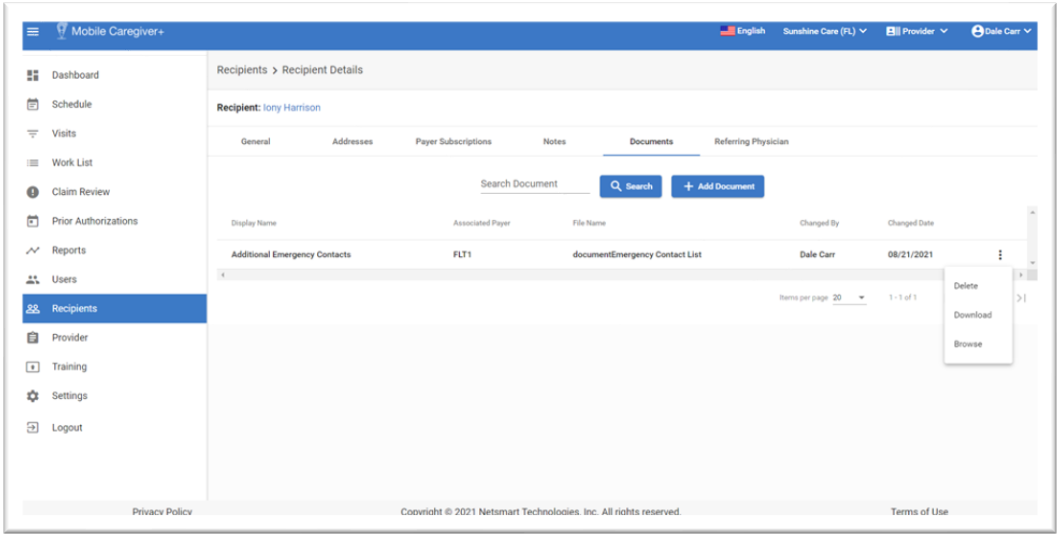


Note: Caregivers' will be able to download and view documents in Recipients' EVV profiles from the Mobile Caregiver+ application.

Providers can search/filter for note entries by keyword(s). Provide can enter keyword(s) in the Search Notes field and click the blue search command.

Provider can sort the list by clicking any of the column headings.

5. Click on the blue **Actions** icon, ⋮, next to the document you want to manage.



6. From the shortcut submenu, providers can select one of the following management options:
    - Delete – To delete the document.
    - Download – To download the document.
    - Browser – To view the details for the document.

Related Topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

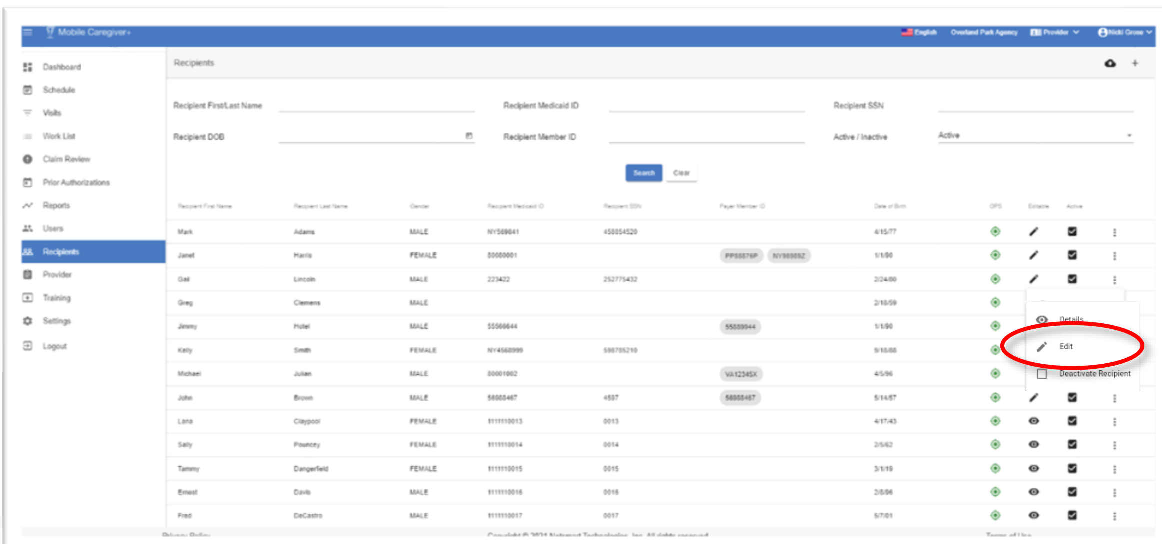
Entering a Referring Physician

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > *Editing a Recipient* > Entering a Referring Physician

Provider can add referring physician data for Recipients that require a Referring Physician for services; the *Referring Physicians* tab allows providers to add to the Mobile Caregiver+ Portal, to select, and to link Referring Physicians to Recipients.

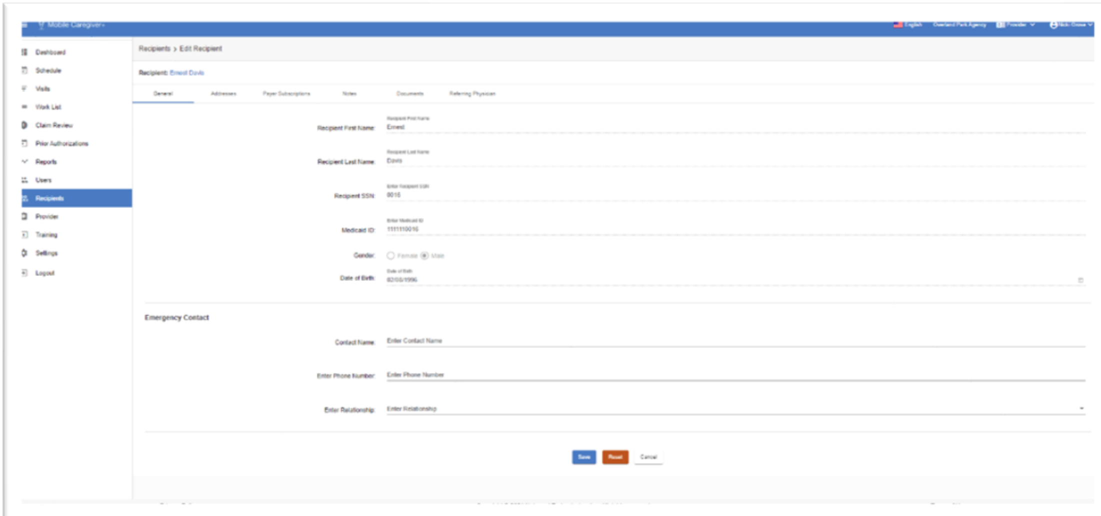
To add a Referring Physician to the Mobile Caregiver+ Portal:

1. From the Main Menu, click **Recipients**.

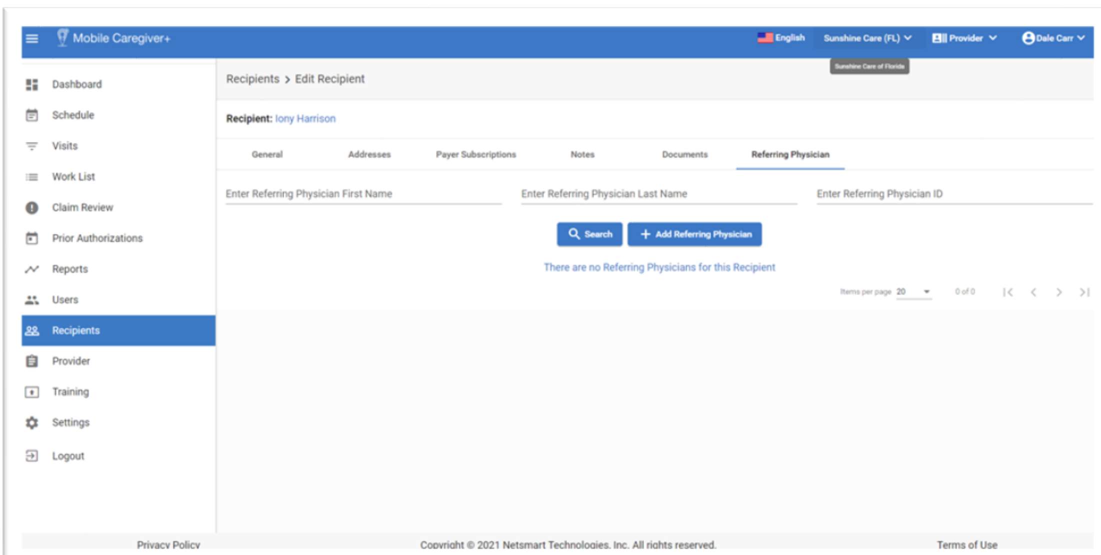


2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient whose notes you want to edit/view.
3. From the shortcut submenu, click **Edit**.

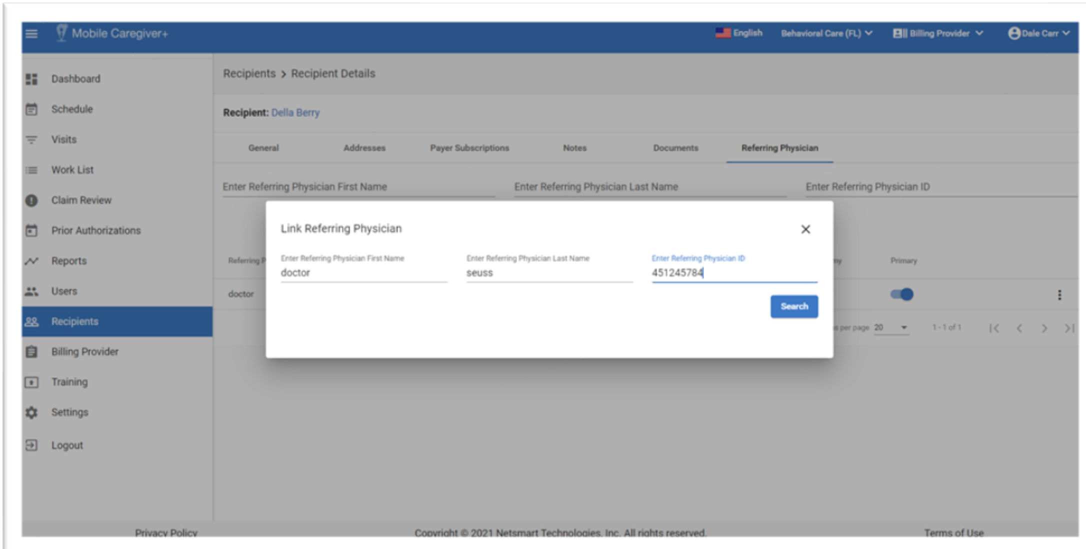
   The system will automatically display the General tab of the Edit Recipient screen.



4. Click on the Add Referring Physician tab.



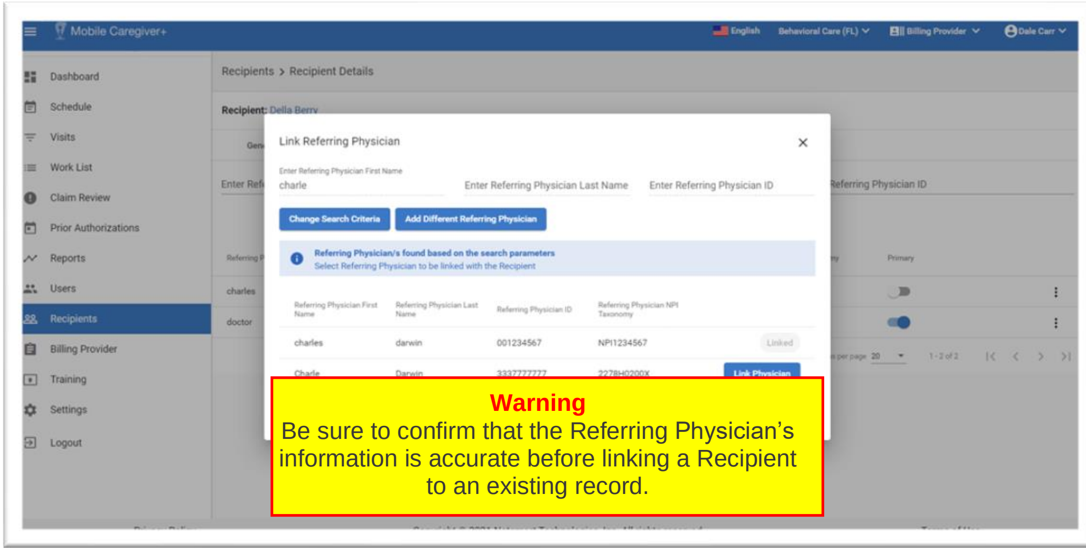
5. Click the blue **Add Referring Physician** command.



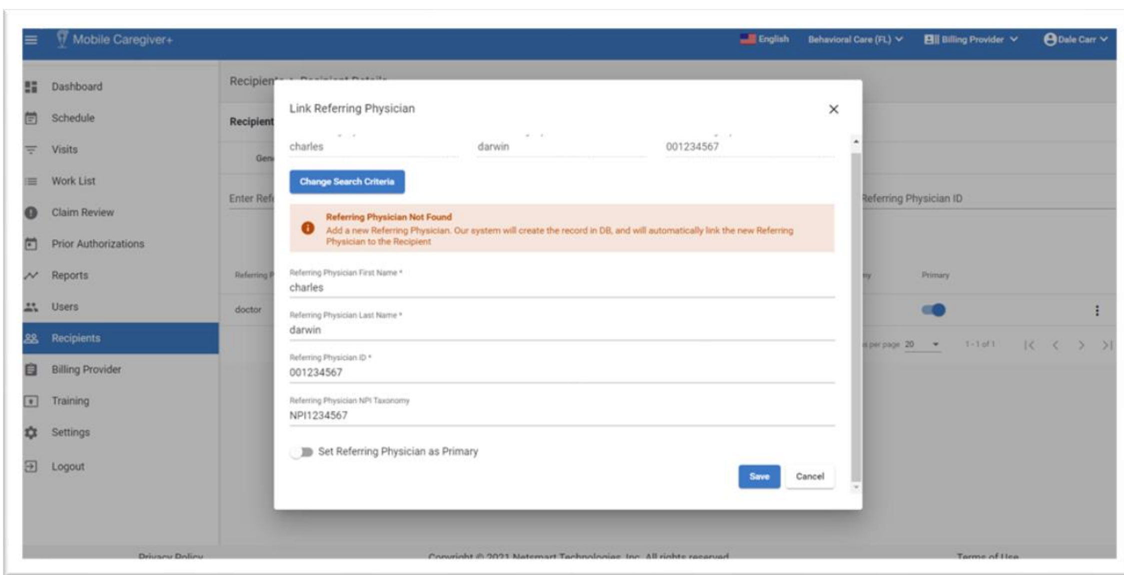
Note: The system requires that providers search to see if the Referring Physician has already been added to the Mobile Caregiver+ System, in which case the provider would simply link the Recipient to the Referring Physician.

6. Enter partial, or complete, search parameter value(s) in one or more of the following fields: **First Name, Last Name** and/or **Physician ID** in **the Link Referring Physician** dialog box.
7. Click the blue **Search** command.

   Note: The system will search for any existing Referring Physician record; if there is no existing record for the Referring Physician, they system will display a Link Referring dialog box to allow the User to enter a new Referring record (please skip to step 9).



*If the Referring Physician was already added to the Netsmart System Portal, the system will display the Referring Physician's record; if the information is accurate, the provider can click the blue **Link Physician** command to link the Recipient to the Referring Physician, or click the blue **Add Different Referring Physician** to add a new record.*



8. Enter the Referring Physician's First Name, Last Name, Physician ID, and NPI Taxonomy in the Link Referring Physician dialog box.

9. Click the blue **Save** command to add the Referring Physician to the Netsmart System; the system will automatically link the Recipient to the new Referring Physician.

Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*
- *Activating an Inactive Recipient*

Deactivating a Recipient

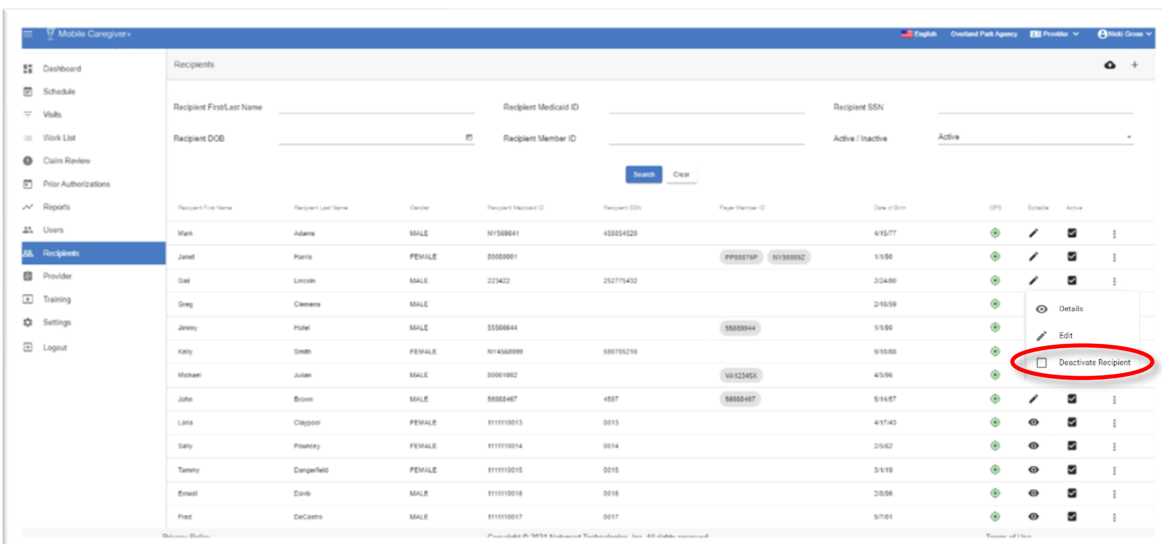
You are here: *[Mobile Caregiver+ Provider Portal User Guide]* > *[Managing Recipients]* > Deactivating a Recipient

When Recipients are added to the Mobile Caregiver+ System they automatically have the status Active. Providers can deactivate Recipients who you no longer provide services for, who are no longer eligible for services, or who were entered under the wrong agency.

Deactivating a Recipient does not remove the Recipient's EVV profile from Netsmart EVV System; it simply unlinks the Recipient from an agency. Providers can activate or de-active Recipients at any time.

To deactivate a Recipient:

1. From the Main Menu, click **Recipients**.



2. Find the Recipient and click on the **Actions** icon, ⋮, for the Recipient that you want to deactivate, unlink from the agency.
3. From the shortcut submenu, click **Deactivate Recipient** checkbox.

   The system will automatically deactivate the Recipient; the Recipient will no longer appear in the Active Recipients List - The system does not allow users to create new visits, new claims, or display Prior Authorization and reports for inactive Recipients. .

Related topics:

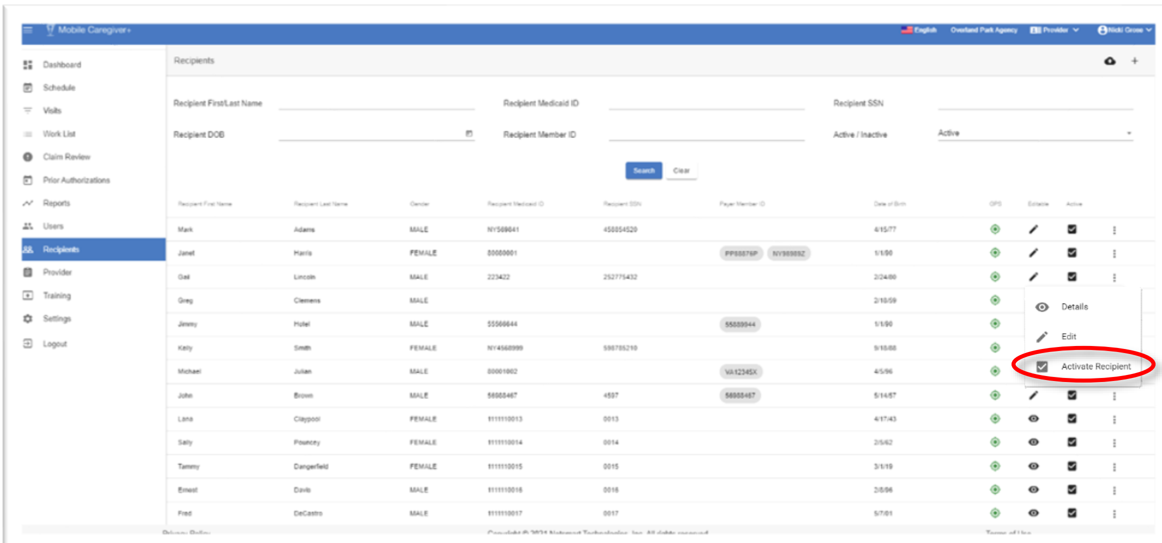
- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Activating an Inactive Recipient*

Activating an Inactive Recipient

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Recipients* > Activating an Inactive Recipient

To activate an inactive Recipient:

1. From the Main Menu, click **Recipients**.



2. Find the Recipient and click on the **Actions** icon, ⁝, for the Recipient that you want to activate, relink to the agency.
3. From the shortcut submenu, click **Activate Recipient** checkbox.

   The system will automatically reactivate the Recipient; the Recipient will now appear in the Active Recipients List.

Related topics:

- *Searching for and Viewing Recipients*
- *Adding a New Recipient*
- *Importing a Group of New Recipients*
- *Editing a Recipient*
- *Uploading Documents for a Recipient*
- *Deactivating a Recipient*

Managing Provider Agencies

You are here: *Mobile Caregiver+ Provider Portal User Guide* > Managing Provider Agencies

In most cases, provider Agencies and Payers (including service codes and payment rates) are uploaded to the Mobile Caregiver+ Provider Portal and you will rarely have to perform the functions discussed in this section. Also, not all provider agencies have access rights to edit their provider settings; the Payer will determine whether providers can edit their Provider settings, as well as the settings they can modify. Contact Netsmart Customer Support if you have questions **before** changing any Provider settings.

Click a topic below:

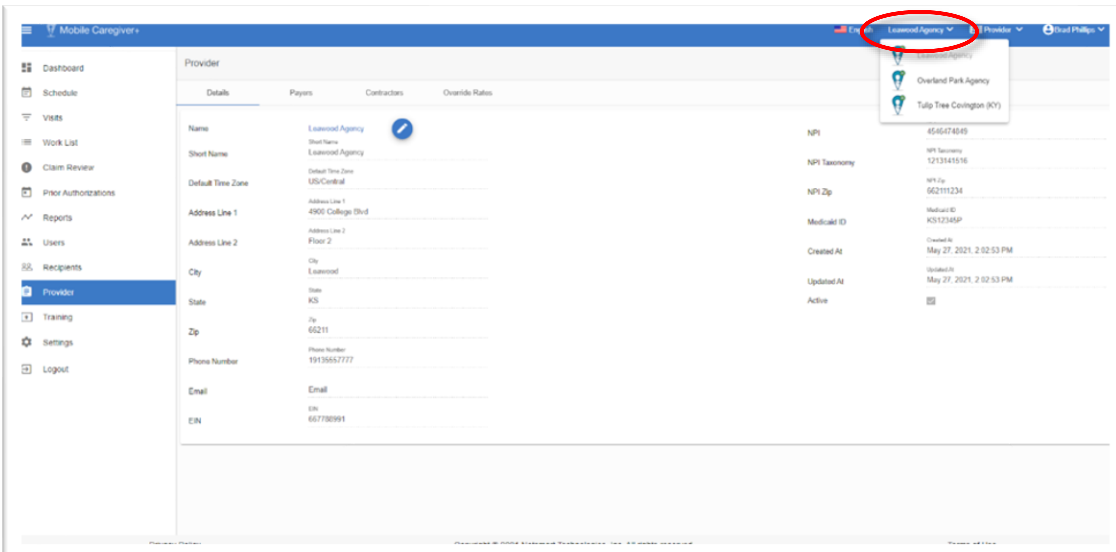
[Deleting a Payer Override Rate](#)

Viewing the Mobile Caregiver+ Details for a Provider Agency

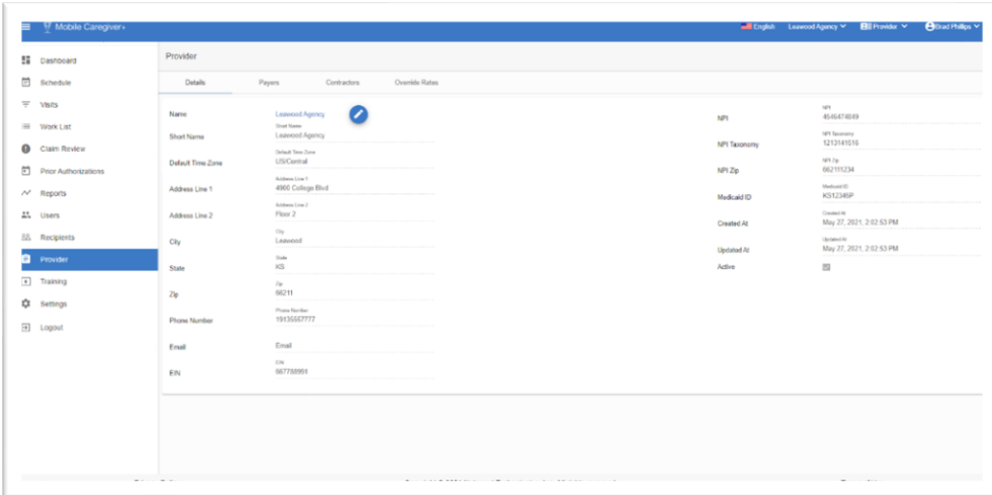
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > Searching for a Provider

To view the Mobile Caregiver+ Details for a provider agency:

1. If your account is linked to multiple locations, click the agency name in the banner to see a dropdown list of all agencies.



2. From the list, select the agency/location you want to view the provider details for. The system will display the Provider Details tab. If your account is linked to multiple locations, click the agency name in the banner to see a dropdown list of all agencies.
   Note: The provider Short Name is the name that is displayed in the dropdown list. Users can only see provider agencies that they have been invited/linked to. See Inviting an Existing User to your Agency.



The system will display the Details for the selected agency.

Related Topics

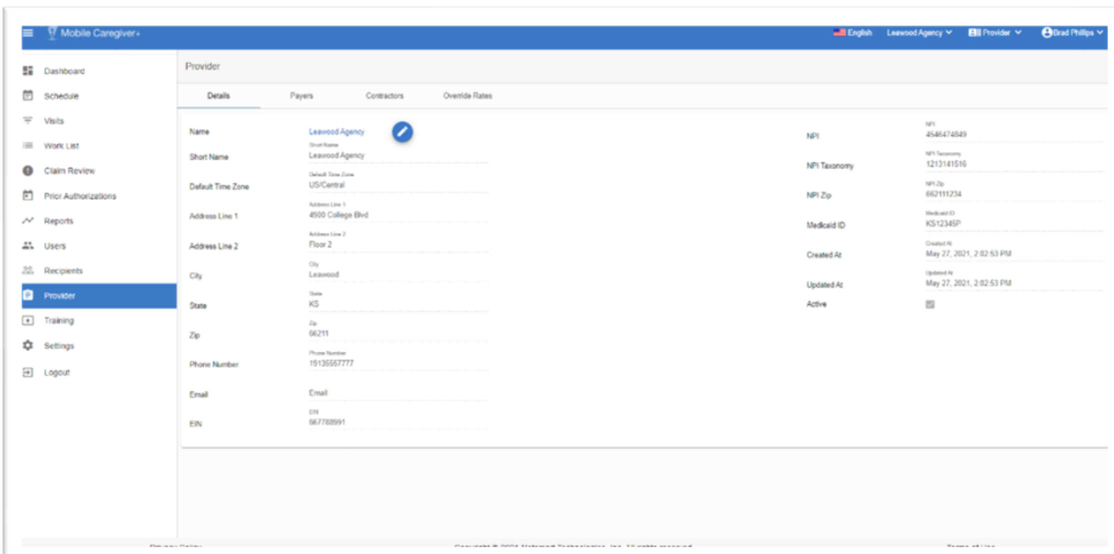
- [Updating Provider Agency Details]()
- [Managing Payers]()
- [Managing Contractors]()
- [Overriding Payer Rates]()

Updating Provider Agency Details

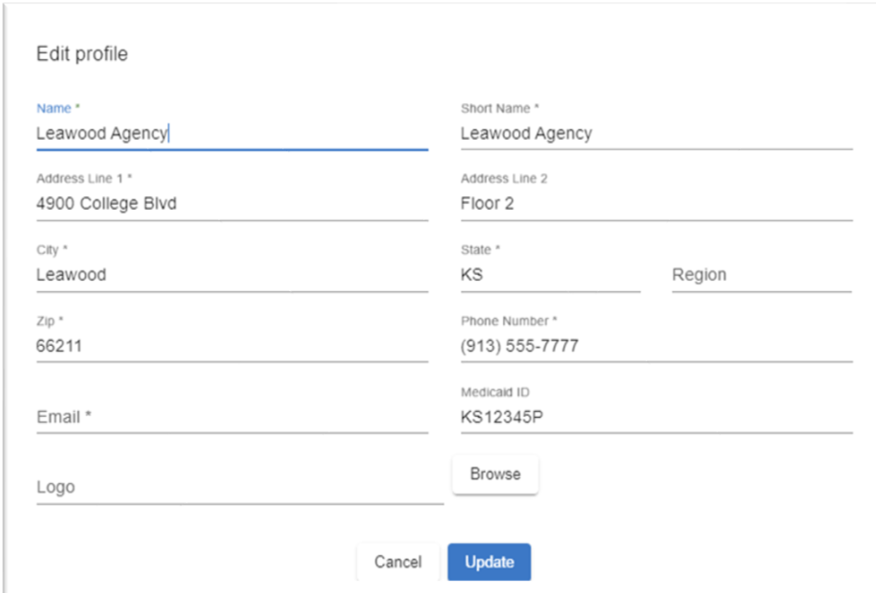
You are here: [Mobile Caregiver+ Provider Portal User Guide]() > [Managing Provider Agencies]() > Updating Provider Agency Details

To update a provider agency's details:

1. If your account is linked to multiple locations, click the agency name in the banner to see a dropdown list of all agencies and select the one you want to update.
2. From the Main Menu**,** click **Provider;** the system will automatically display the Provider Details tab.



3. Click the edit icon, , located in the top left corner of the screen.



User can edit permissible values in their Provider profiles.

4. Click **Update** to save any changes. The system will return to the initial Provider Details screen.

Related Topics

- *Searching for a Provider Agency*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Managing Payers

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > Managing Payers

In this section you will find information about:

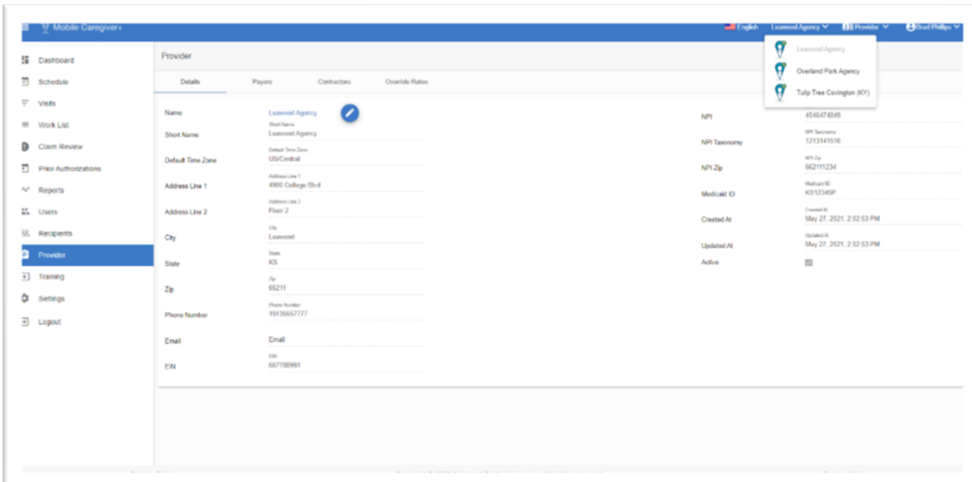
Note: Not all agencies are authorized to add, link, or delete payers. Please contact Netsmart Client Support before changing any Payer settings for your agency.

Searching for a Payer

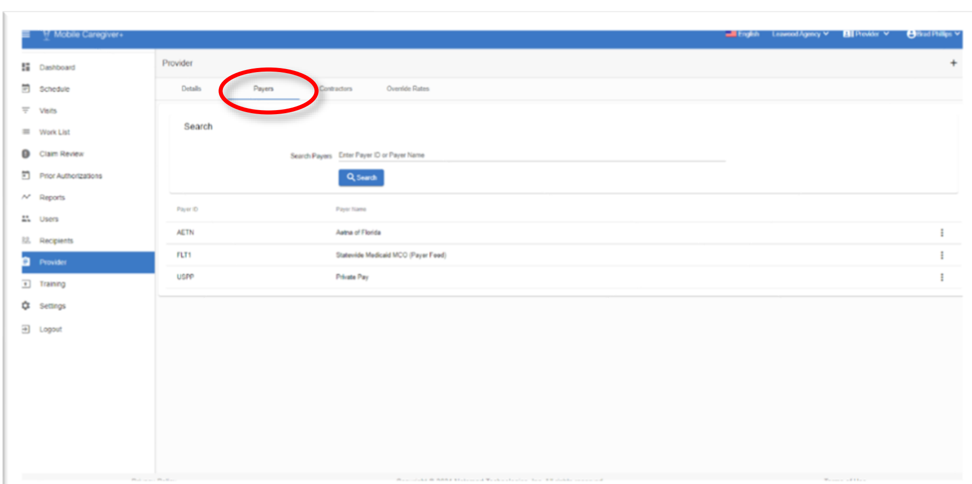
You are here: *[Mobile Caregiver+ Provider Portal User Guide]* > *[Managing Provider Agencies]* > *[Managing Payers]* > Searching for a Payer

To search for a Payer:

1. If your account is linked to multiple locations, click on active agency name in the banner to see a dropdown list of all agencies.

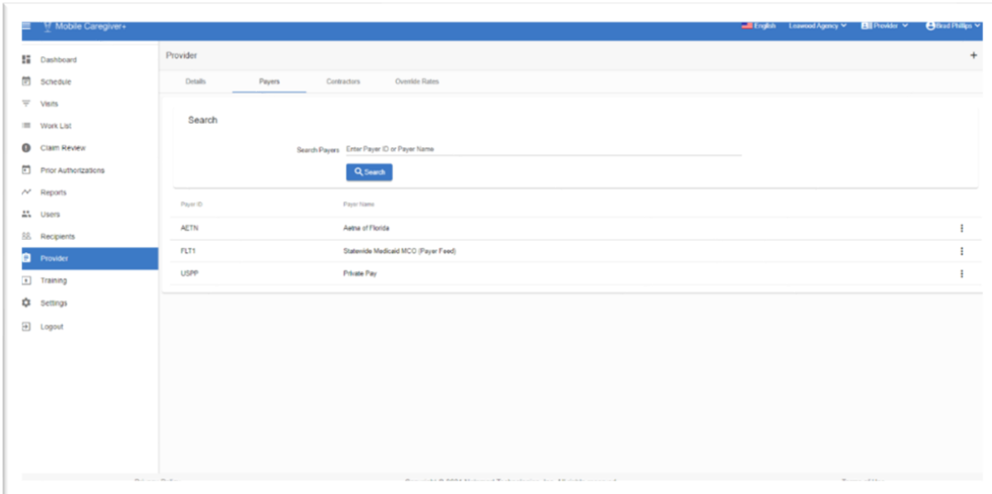


2. From the list, select the agency/location whose Payer(s) you want to view.
3. From the Main Menu, click **Provider**.



4. Click the **Payers** tab to see the Payer(s) associated with the agency.
5. Enter all or part of the Payer's name in the Search Payer field.

6. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.



Related Topics

- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Assigning Preconfigured Tasks to a Payer Service Code

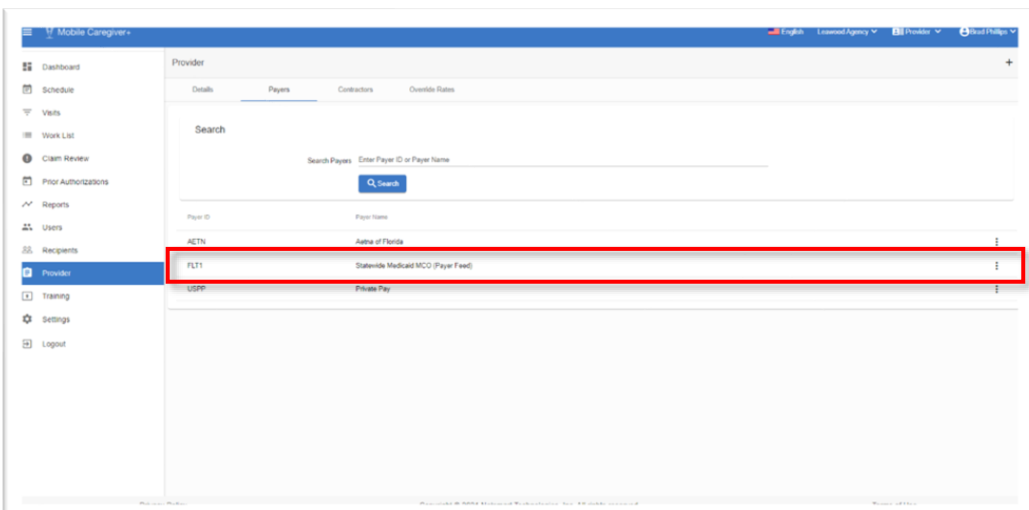
You are here: Mobile Caregiver+ Provider Portal User Guide > Managing Provider Agencies > Managing Payers > Assigning Preconfigured Tasks to a Payer Service Code

Depending on the Payer and Program Recipients are enrolled in, some Payers will automatically upload Tasks (also known as Plan of Care Activities or Daily Living activities) to the Provider Portal; some payers allow providers to add and manage Tasks.

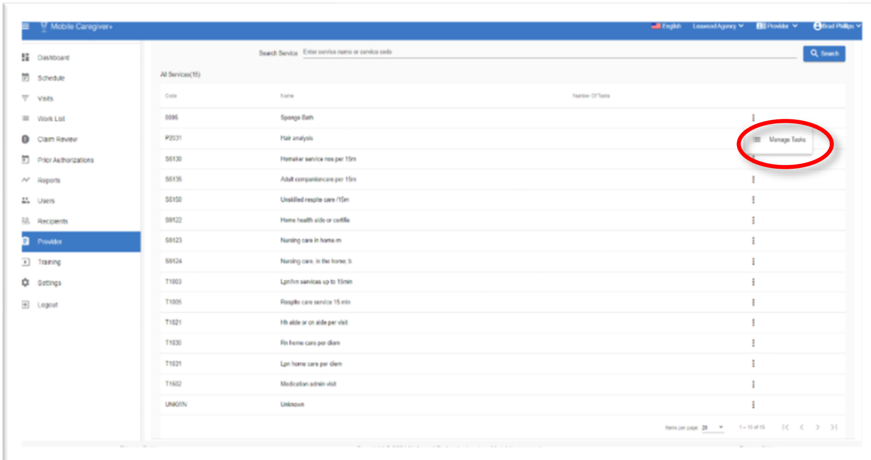
All Tasks should be configured as part of the setup process before providers begin adding/scheduling visits in their Mobile Caregiver+ Provider Portals.

To assign preconfigured Tasks to a Service Code:

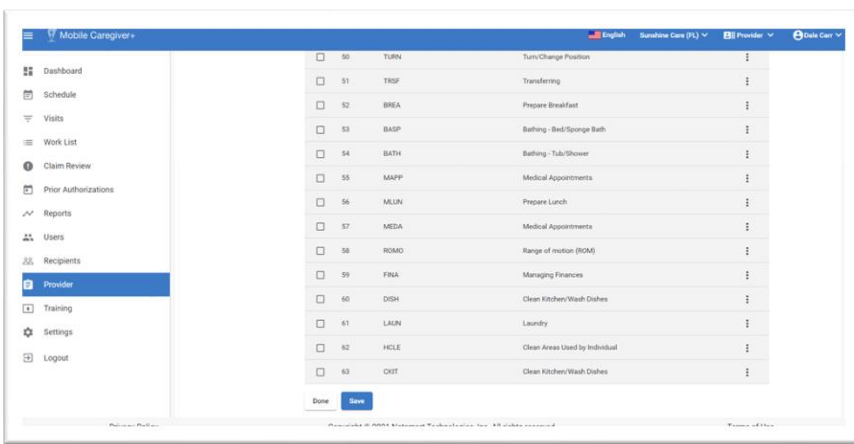
1. From the Main Menu, click the **Provider**.
2. Click the **Payers** tab.



3. Find the Payer you want to whose tasks you want to configure, then click on the Payer's record to view the details.



4. Scroll down in the Payer's Details screen to view the list of Service Codes that are configured for the Payer.
5. Click the **Actions, ⋮,**icon for the Service Code you want to configure Tasks for.
6. From the shortcut submenu, click **Manage Tasks**



7. Place a checkmark in the checkboxes for all preconfigured Tasks to be assigned to the selected service code.
8. Scroll the bottom of the Tasks form and click the blue **Save** command to save and assign the Task(s) to the selected service code.

   Click the **Done** command to exit the Tasks form.

Related Topics

- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Manually Adding a New Task for a Payer Service Code (Available if program allows it)

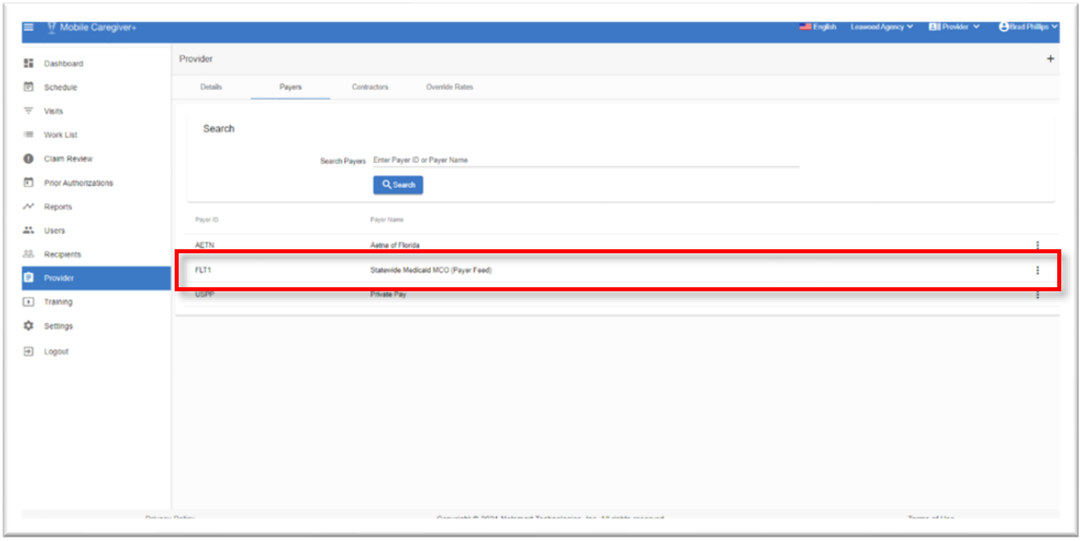
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payers* > Assigning a Task to a Payer Service Code

Depending on the Payer and Program a Recipient is enrolled in, some Payers will automatically upload Tasks (also known as Plan of Care Activities or Daily Living activities) to the Provider Portal; some Payers allow providers to add and manage Tasks.

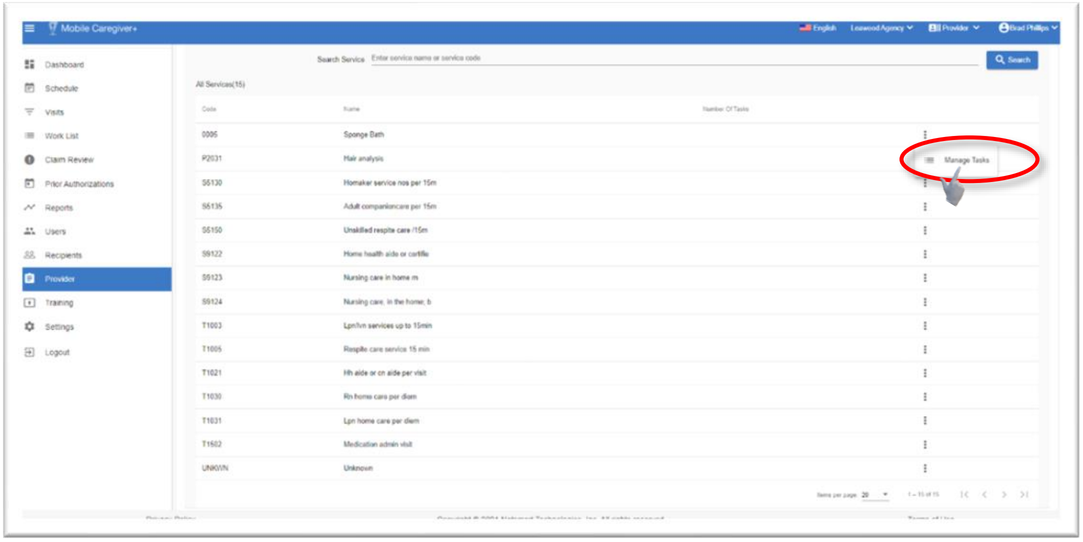
All Tasks should be configured as part of the setup process before providers begin adding/scheduling visits in their Mobile Caregiver+ Provider Portals.

To manually create and add custom Tasks to a Service Code:

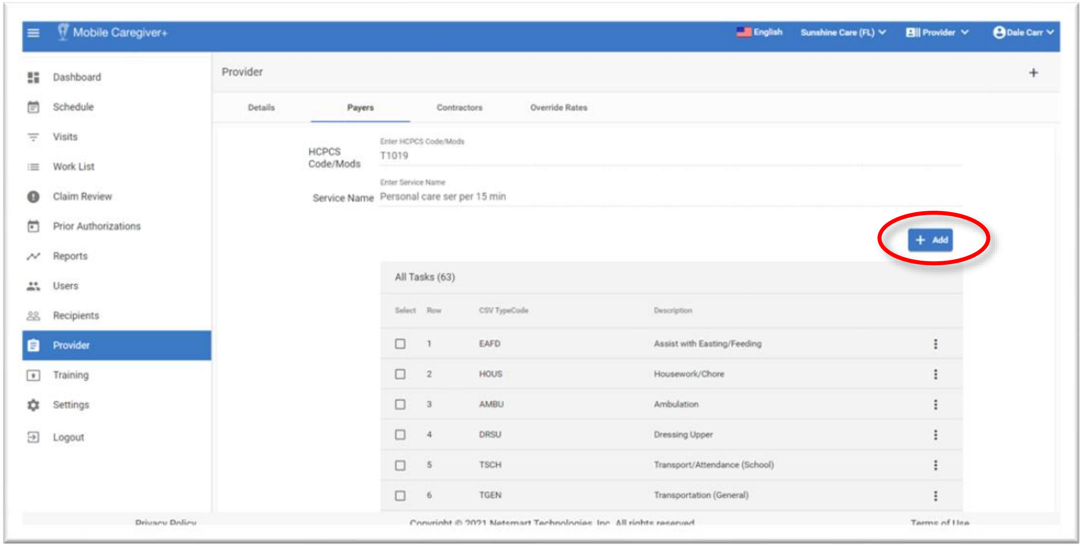
1. From the Main Menu, click **Provider**.
2. Click the **Payers** tab.



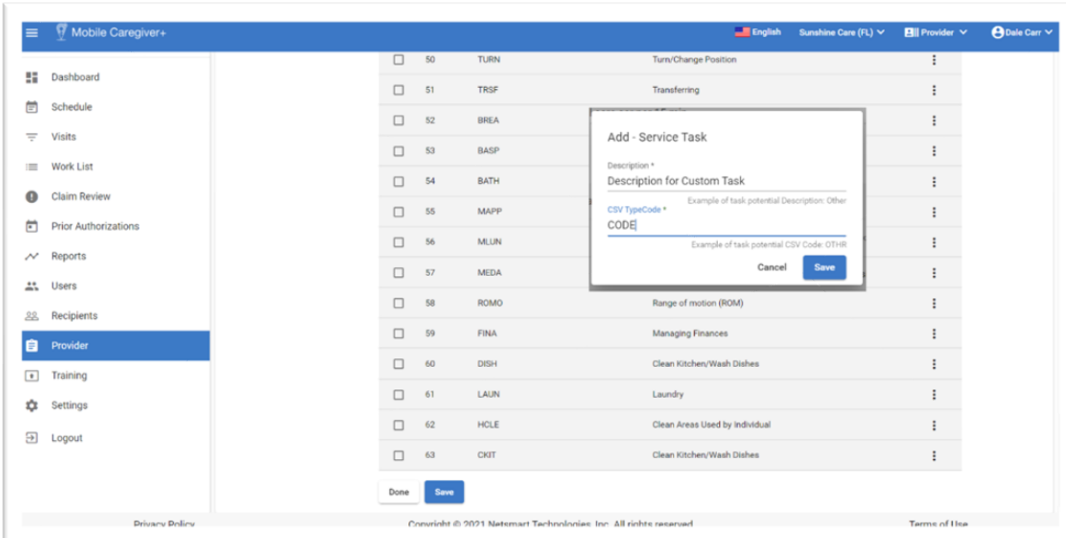
3. Find the Payer whose tasks you want to configure, then click on the Payer's record to view the details.



4. Scroll down in the **Payer's Details** to view the list of Service Codes that are configured for the Payer.
5. Click the **Actions** icon, ⋮, for the Service Code you want to add a new Task to and select **Manage Tasks.**



6. Click the **Add New Task**, + Add, command **+ Add** command.



7. Enter the description for the Task in the **Description** field.
8. Enter a four-letter code for the Task in the **CSV TypeCode** field.
9. Click the blue **Save** command to add the custom Task to the list of Tasks.
10. The new task is added to the bottom of the list; the new Task will automatically be selected.
11. Scroll the bottom of the Tasks form and click the blue **Save** command to save and assign the Task(s) to the selected service code.
12. Click the **Done** command to exit the Tasks form.

Related Topics

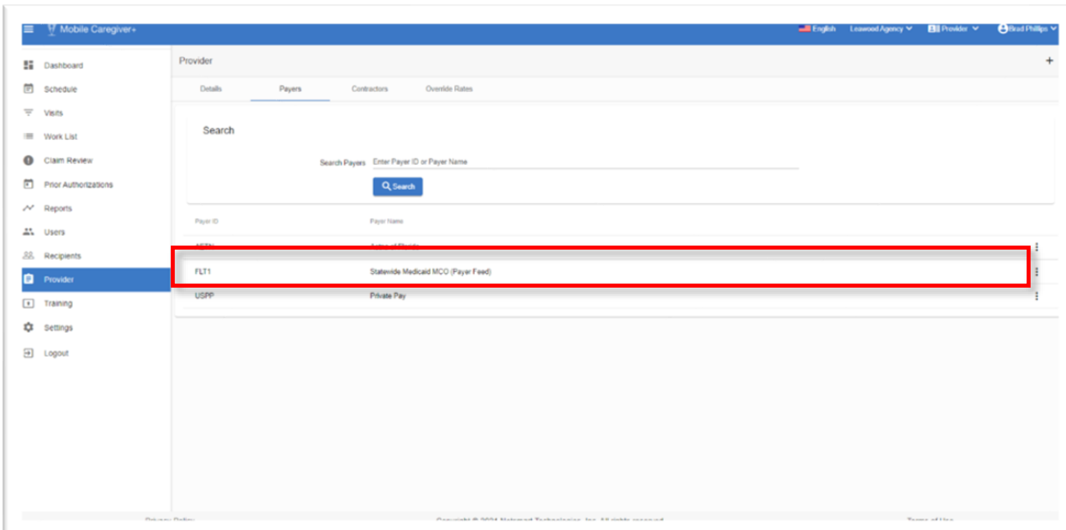
- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Deleting Manually Added Tasks for a Payer (Available if program allows it)

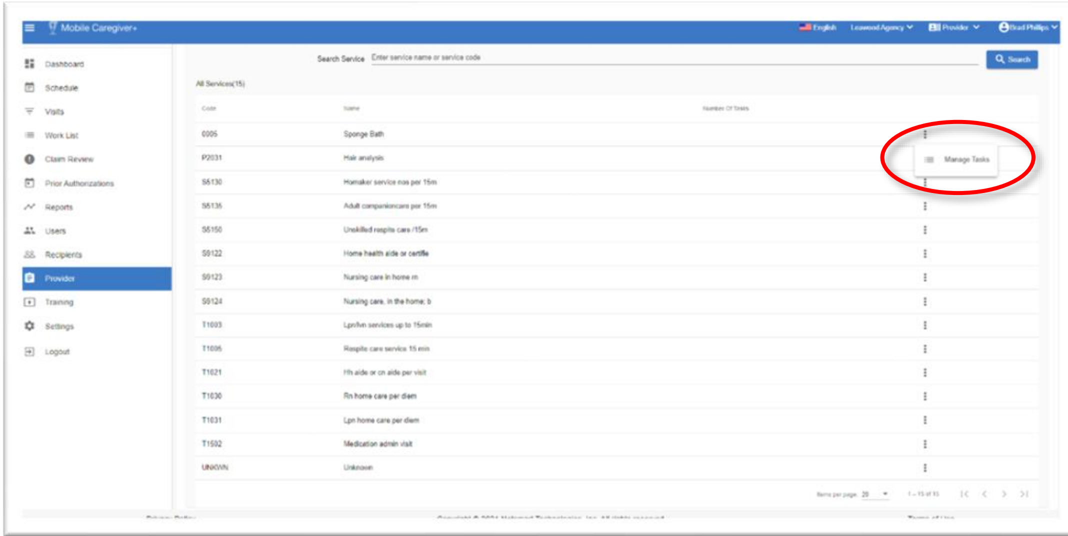
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > Deleting Manually Added Tasks for a Payer

To delete a task:

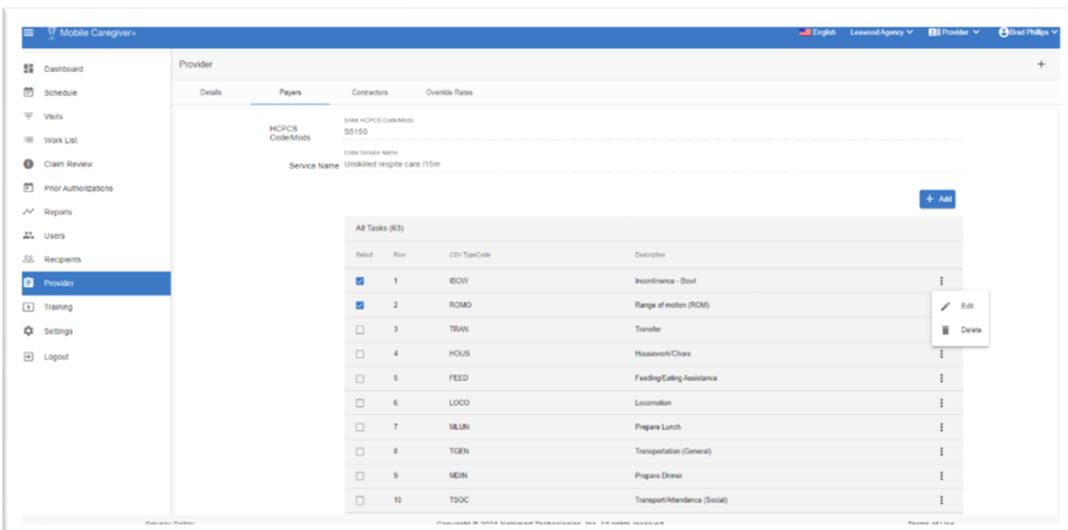
1. From the Main Menu, click **Provider**.



2. Click the **Payers** tab.
3. Find the Payer you want to whose Service Code you want to delete Tasks from, then click on the Payer's record to view the details.



4. Scroll down in the **Payer's Details** to view the list of Service Codes that are configured for the Payer
5. Click the **Actions** icon, ⋮, for the Service Code you want to delete Tasks from and select **Manage Tasks.**



6. Locate and click on the **Actions** icon, ⋮, for the Task you want to delete.
7. From the shortcut submenu, click **Delete**.
8. Scroll to the bottom of the page and click the blue **Save** command to save the change
9. Click **Done** to exit the Tasks form.

Related Topics

- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

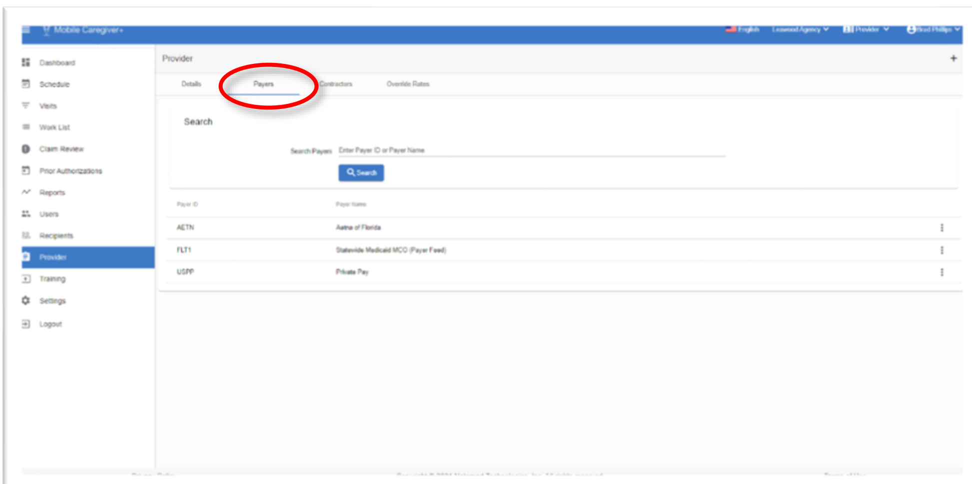
Adding a Medicaid ID at the Payer / Plan / Program Level

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payers* > Adding a Provider Medicaid ID at the Payer / Plan / Program Level

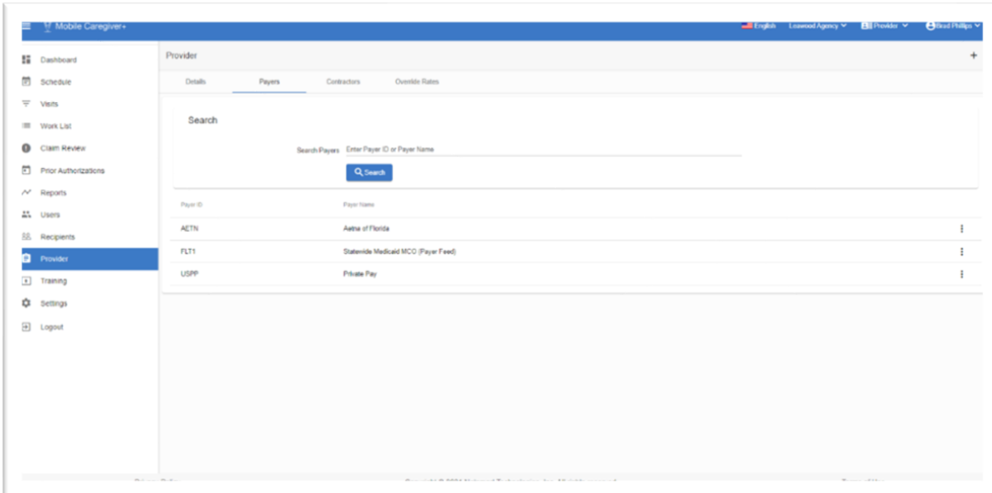
Depending on the Payer, the system allows Providers to enter a Provider Medicaid ID that is associated with a Payer, Plan, and Program. This is an override to the Medicaid ID associated with the Provider.

To add a Provider Medicaid ID that is associated with a Payer / Plan / Program:

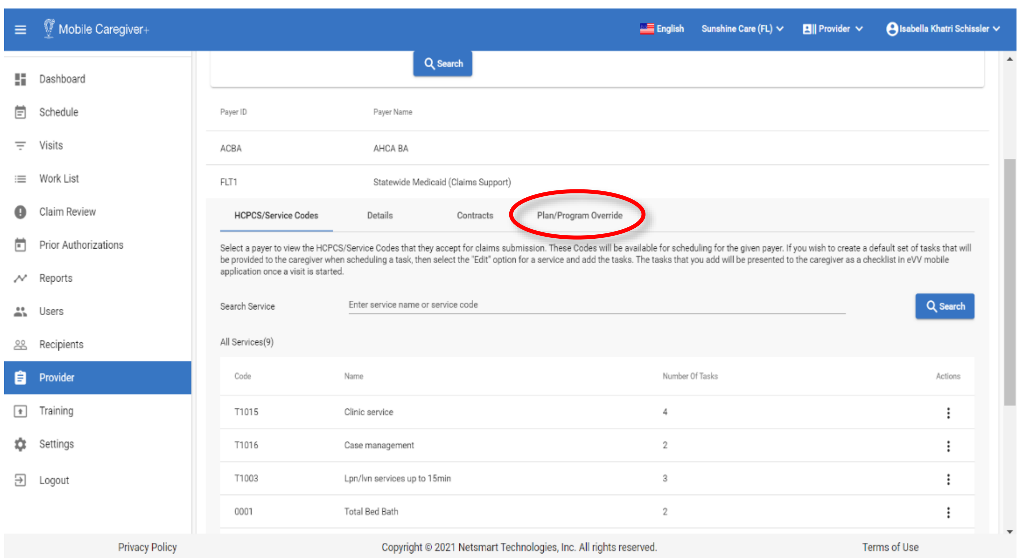
1. From the Main Menu**,** click **Provider**.



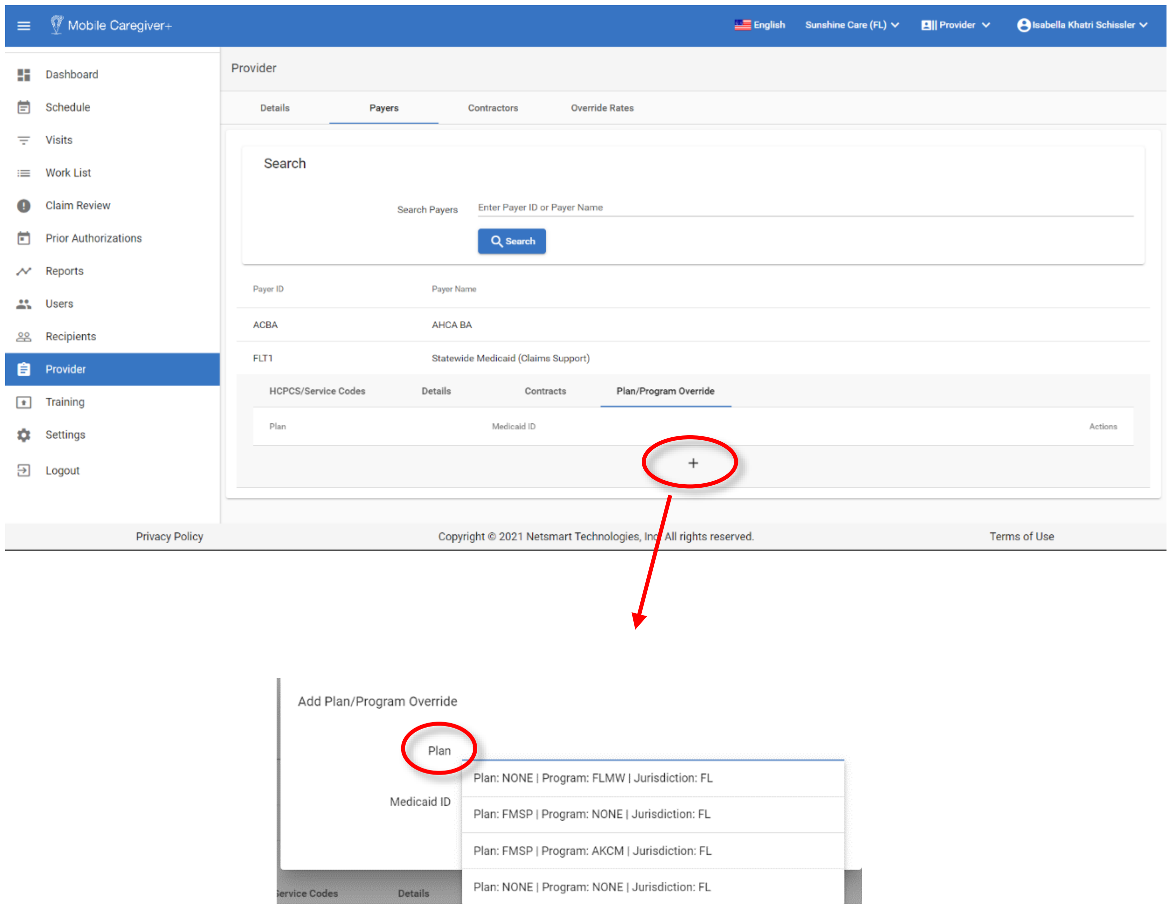
2. Click the **Payers** tab to see the Payer(s) associated with the agency.
3. Enter all or part of the Payer's name in the Search Payer field.
4. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.



5. Select the Payer in which you will enter a Provider Medicaid ID. The system will expand the Payer's information.

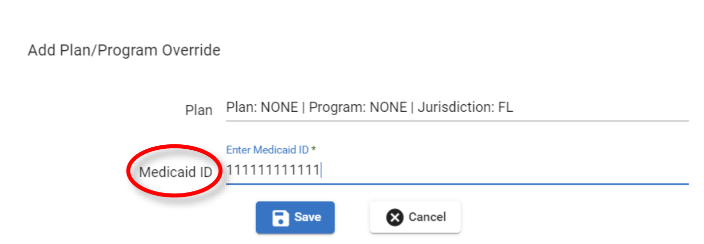


6. Click the **Plan/Program Override** tab.
7. Click the add **(+)** button to open the **Add Plan/Program Override** dialogue box.



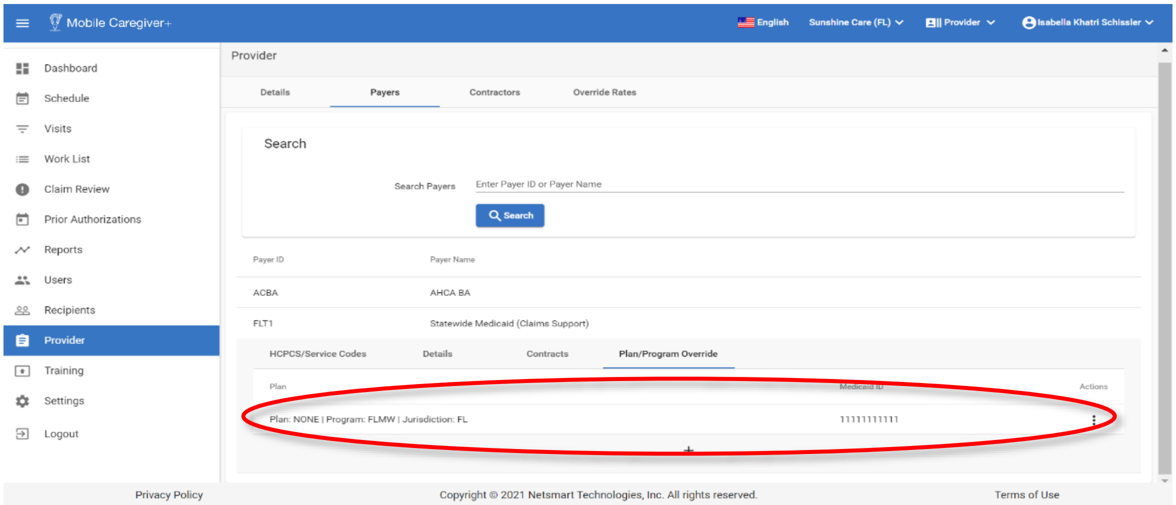
8. In the **Add Plan/Program Override** dialogue box, use the drop-down in the **Plan** field to select the Plan/Program for which the Provider's Medicaid ID is associated.
9. Type the Provider's **Medicaid ID**, that is associated with the Plan/Program, in the respective field.

   *Note: The Provider **Medicaid ID** field is required. If this field is left blank, the user will not be able to save changes.*



10. Click **Save** to save the edits. Click **Cancel**, to discard any entries made and close out of the **Add Plan/Program Override** dialogue box.

The Plan/Program section will be added to the screen and the section will display the Plan(s)/Program(s) with a Medicaid ID override set up for the selected Payer.

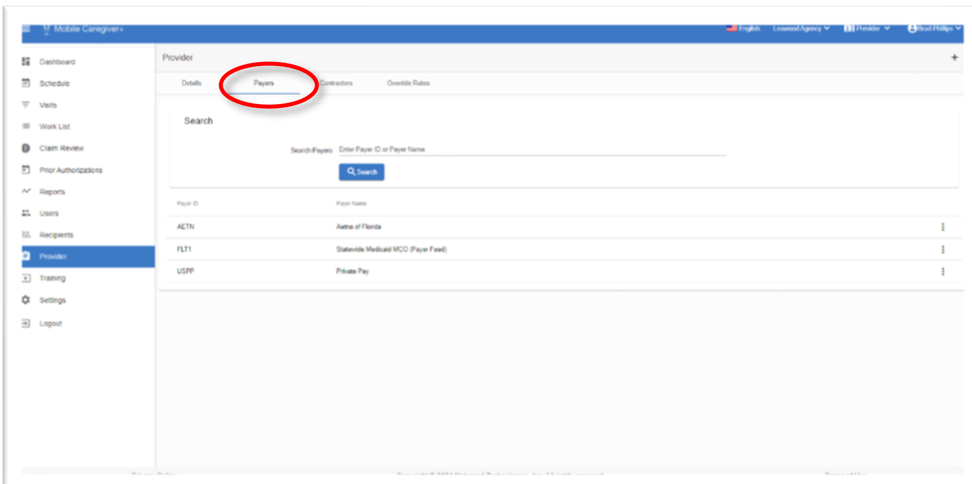


Editing a Provider Medicaid ID at the Payer / Plan / Program Level

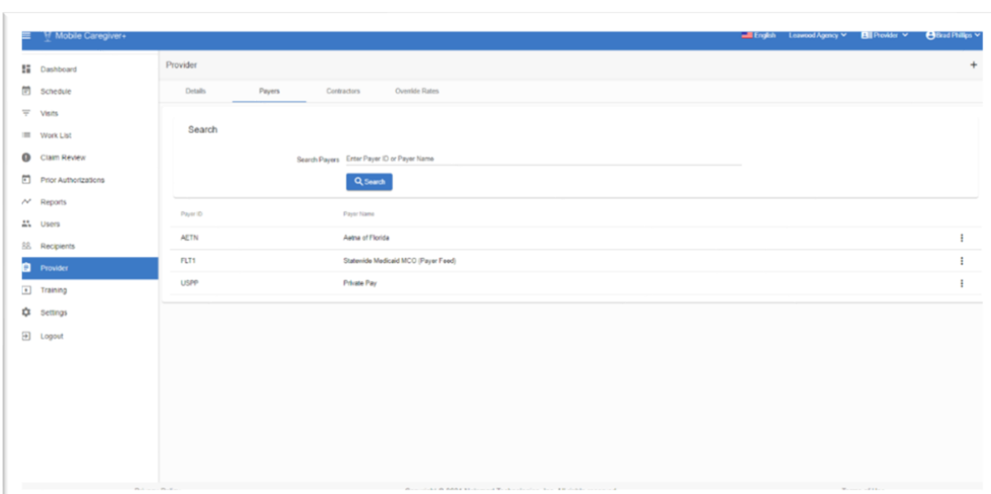
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payers* > Editing a Provider Medicaid ID at the Payer / Plan / Program Level

To edit a Provider Medicaid ID at the Payer / Plan / Program level:

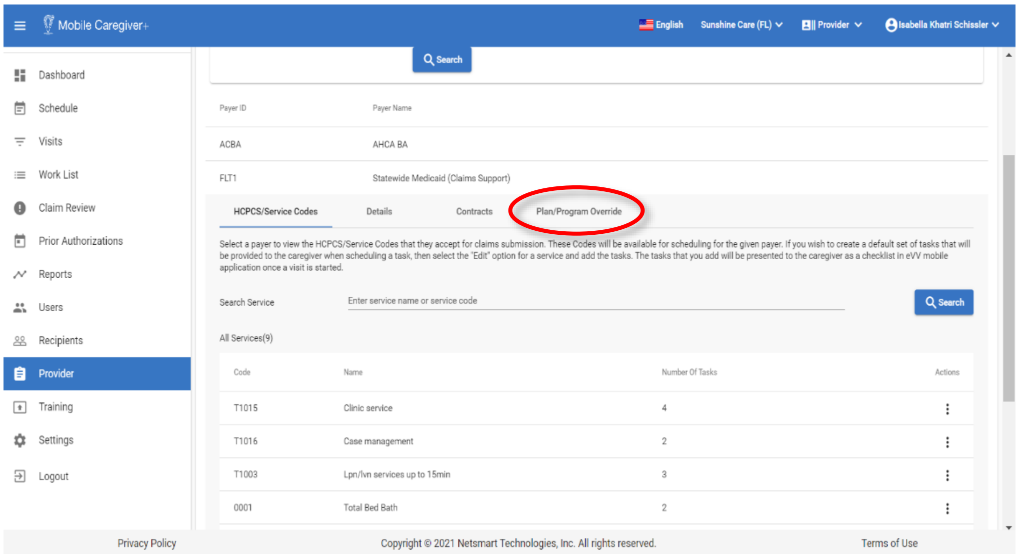
1. From the Main Menu, click **Provider**.



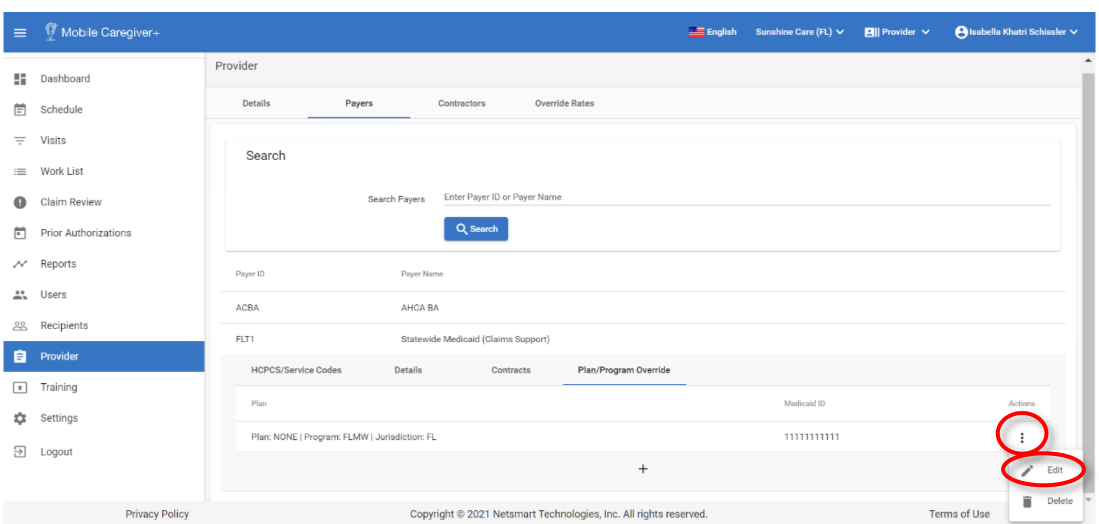
2. Click the **Payers** tab to see the Payer(s) associated with the agency.
3. Enter all or part of the Payer's name in the Search Payer field.
4. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.



5. Select the Payer in which you will enter a Provider Medicaid ID. The system will expand the Payer's information.

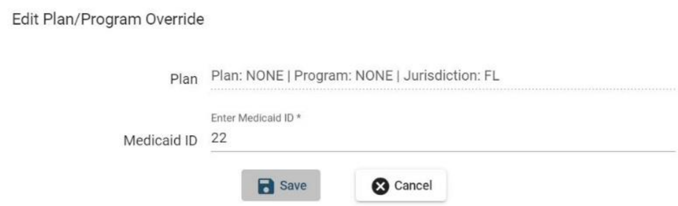


6. Click the **Plan/Program Override** tab. The system will display the Plan / Program name with the Medicaid ID associated.
7. Find the plan that needs to be edited.
8. Click the actions icon, located to the right of the **Plan** line.



9. From the submenu, click **Edit.**

   *The **Edit Plan/Program Override** dialogue box will appear.*



10. Edit the **Plan** and/or the **Medicaid ID.**

    *Click **Cancel** to discard any entries and close the **Edit Plan/Program Override** dialogue box.*

11. Click **Save** to save the changes.

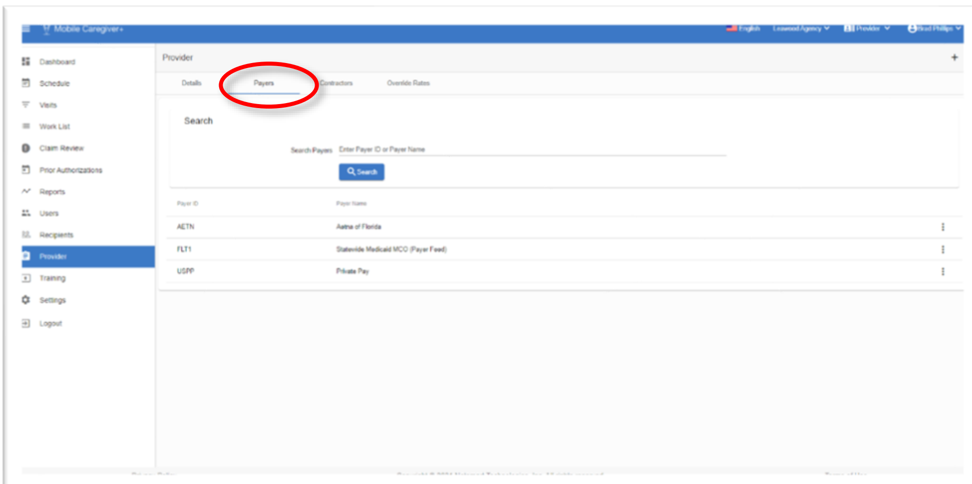
    *The updated record will be displayed in the **Plan/Program**.*

Deleting a Provider Medicaid ID at the Payer / Plan / Program Level

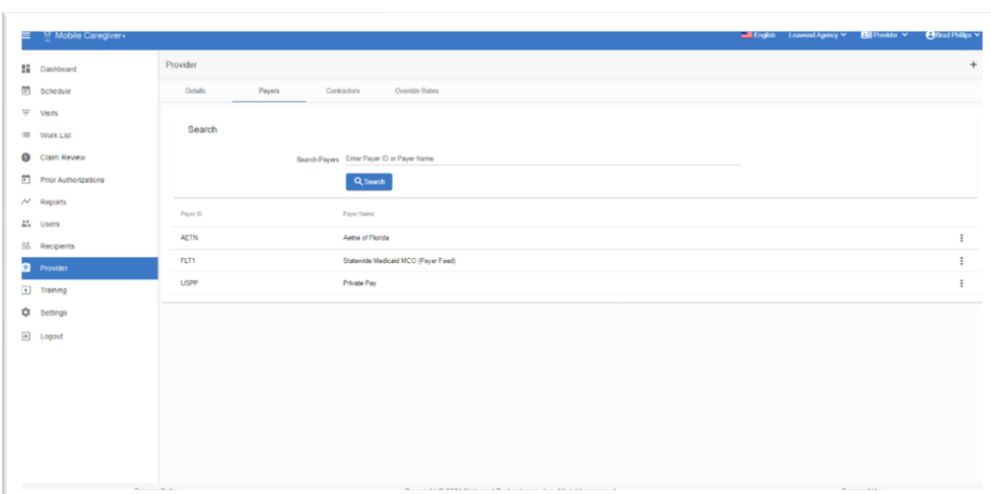
You are here: Mobile Caregiver+ Provider Portal User Guide > Managing Provider Agencies > Managing Payers > Deleting a Provider Medicaid ID at the Payer / Plan / Program Level

To delete a Provider Medicaid ID at the Payer / Plan / Program level:

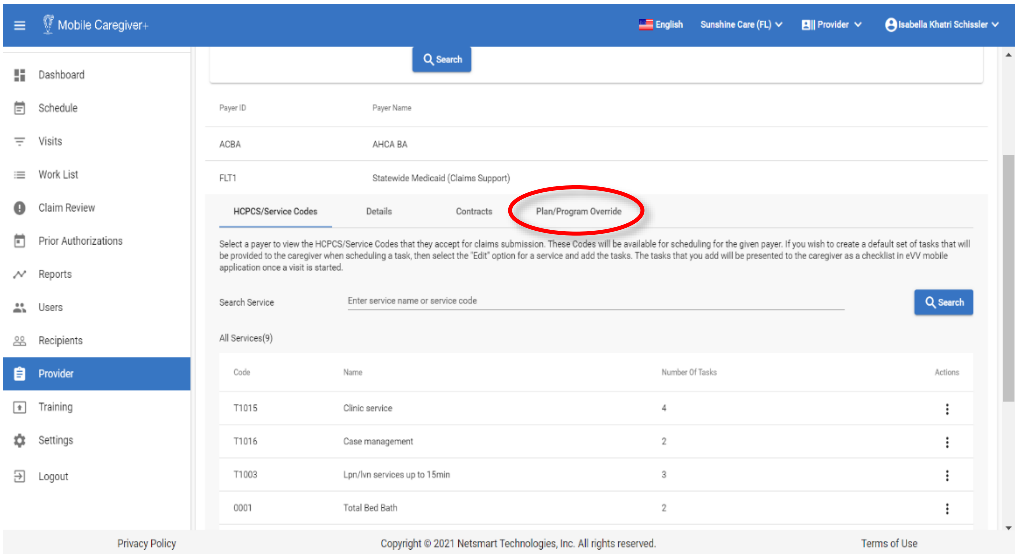
1. From the Main Menu, click **Provider**.



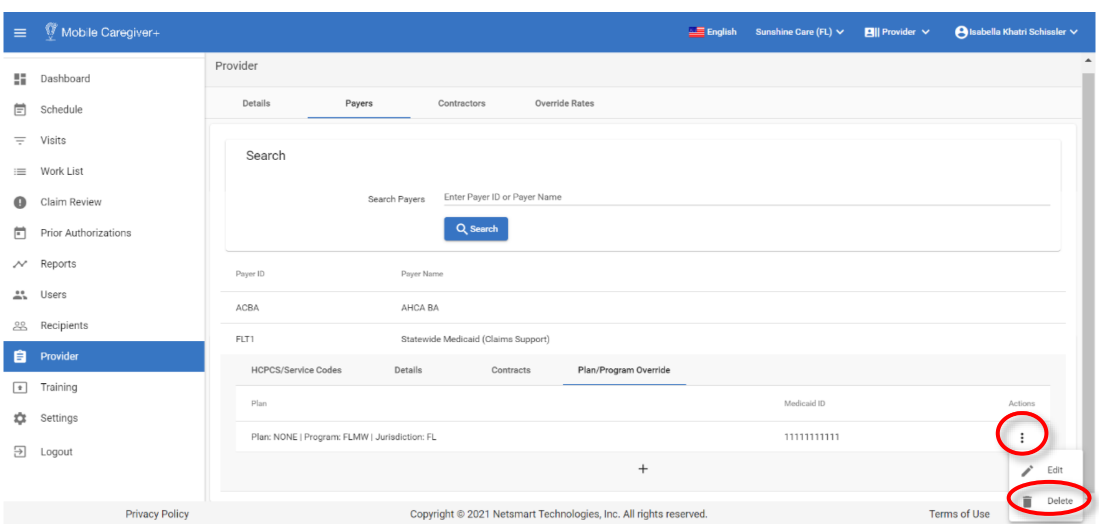
2. Click the **Payers** tab to see the Payer(s) associated with the agency.
3. Enter all or part of the Payer's name in the Search Payer field.
4. Click the blue **Search** command. The system will display a list of Payer(s) that match the search parameter.



5. Select the Payer in which you will enter a Provider Medicaid ID. The system will expand the Payer's information.

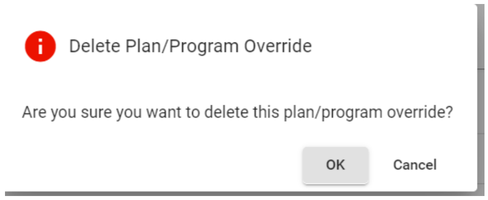


6. Click the **Plan/Program Override** tab. The system will display the Plan / Program name with the Medicaid ID associated.
7. Find the plan that needs to be edited.
8. Click the actions icon, located to the right of the **Plan** line.



9. From the submenu, click **Delete.**

   A confirmation dialogue will appear, to verify deleting the override.



Managing Contractors

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > Managing Contractors

In this section you will find information about:

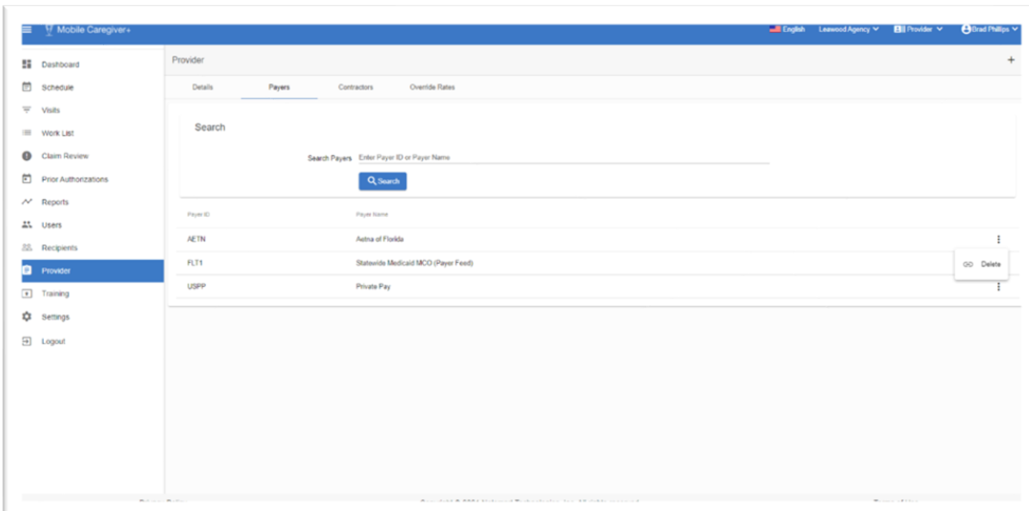
- *Searching for a Contractor*
- *Linking a Provider to Contractors*
- *Deleting a Contractor*

Searching for a Contractor

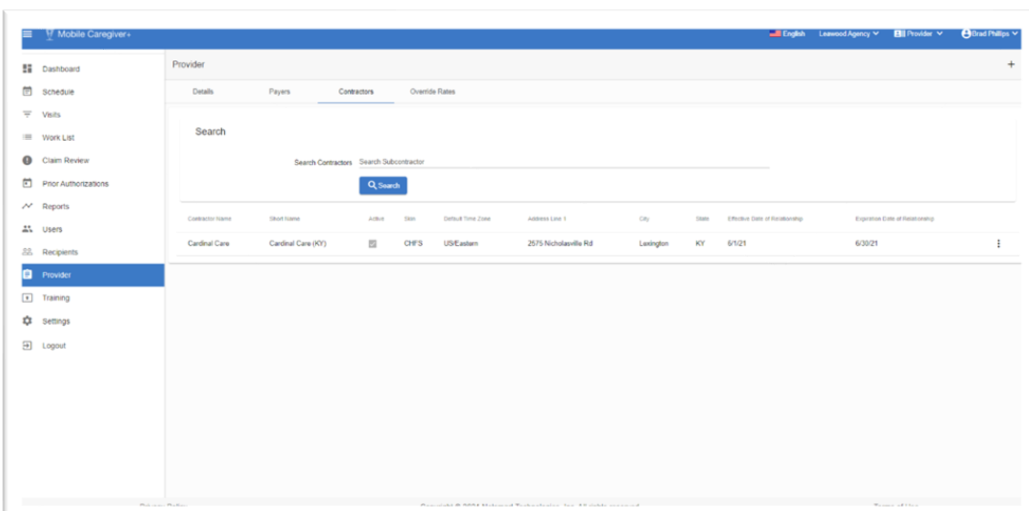
You are here: [Mobile Caregiver+ Provider Portal User Guide]() > [Managing Provider Agencies]() > [Managing Contractors]() > Searching for a Contractor

To find a Contractor:

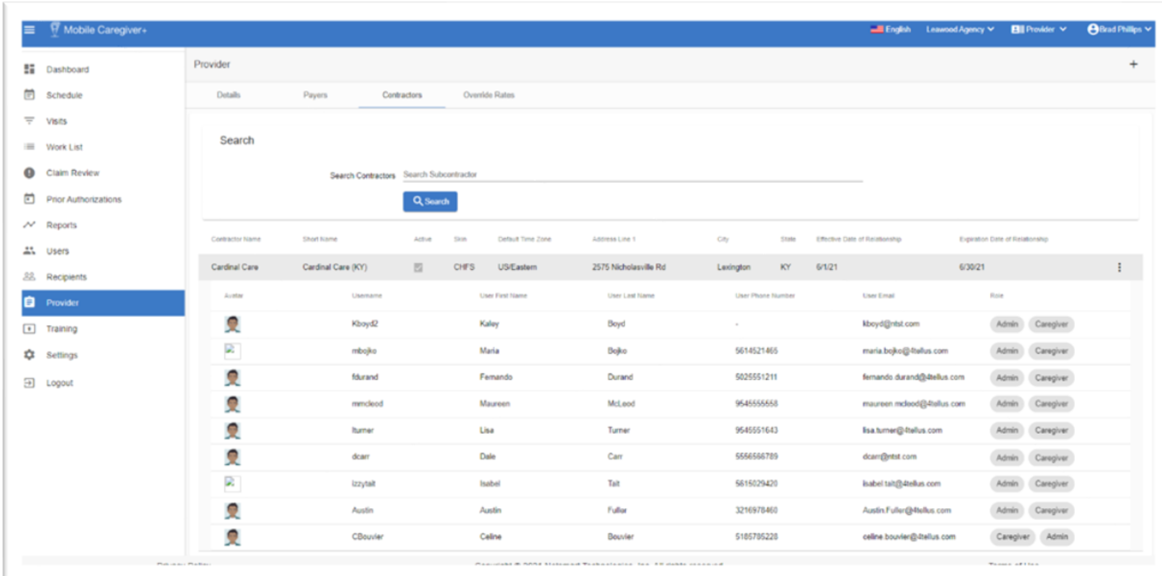
1. From the Main Menu, click **Provider**.



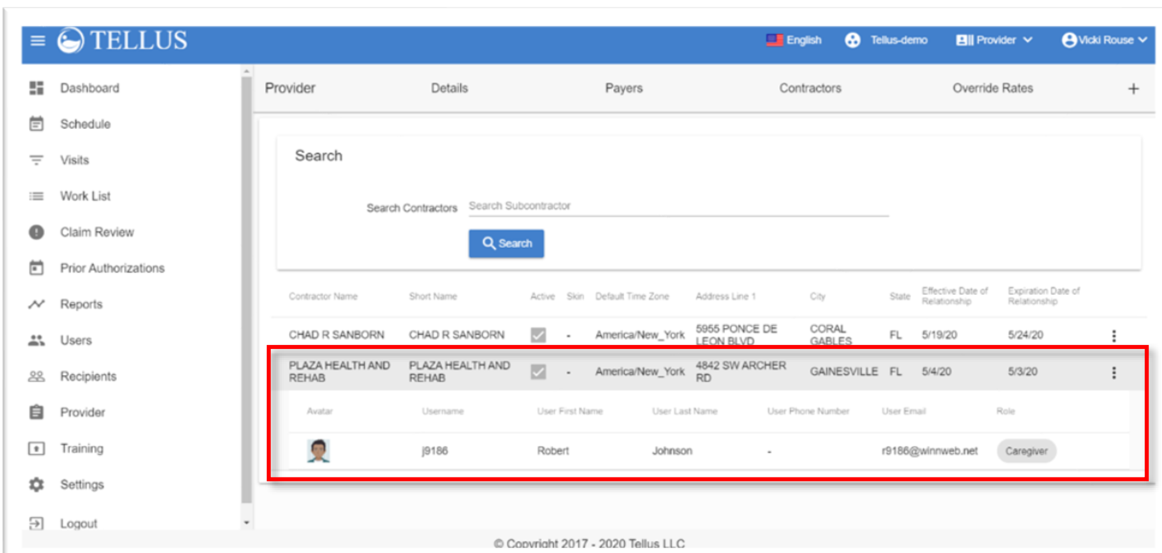
2. Click on the **Contractors** tab.



3. Enter all or part of the Contractor name in the Search Contractor field.
4. Click ***Search***; results display at the bottom of the page



5. Click a line to see the Contractor details.



Related Topics

- Updating Provider Agency Details
- Managing Payers
- Managing Contractors
- Overriding Payer Rates

Linking a Provider to a Contractor

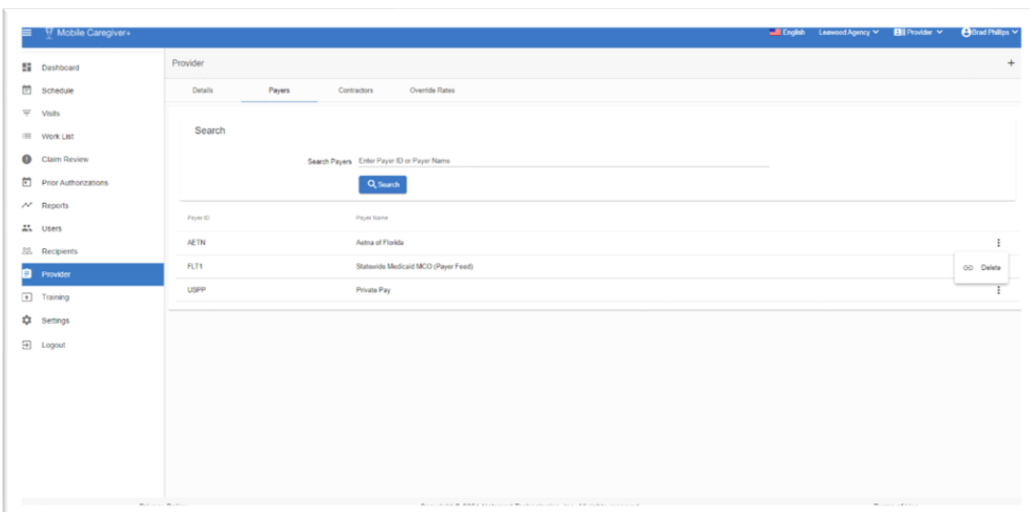
You are here: *[Mobile Caregiver+ Provider Portal User Guide]* > *[Managing Provider Agencies]* > *[Managing Contractors]* > Linking a Provider to a Contractor

Netsmart allows provider agencies to link with other provider agencies (Contractors) to ensure adequate staff are available to provide the services Recipients need. The Contractor will be able to add Users, will have access to your Recipients, and will be able to schedule visits for them.

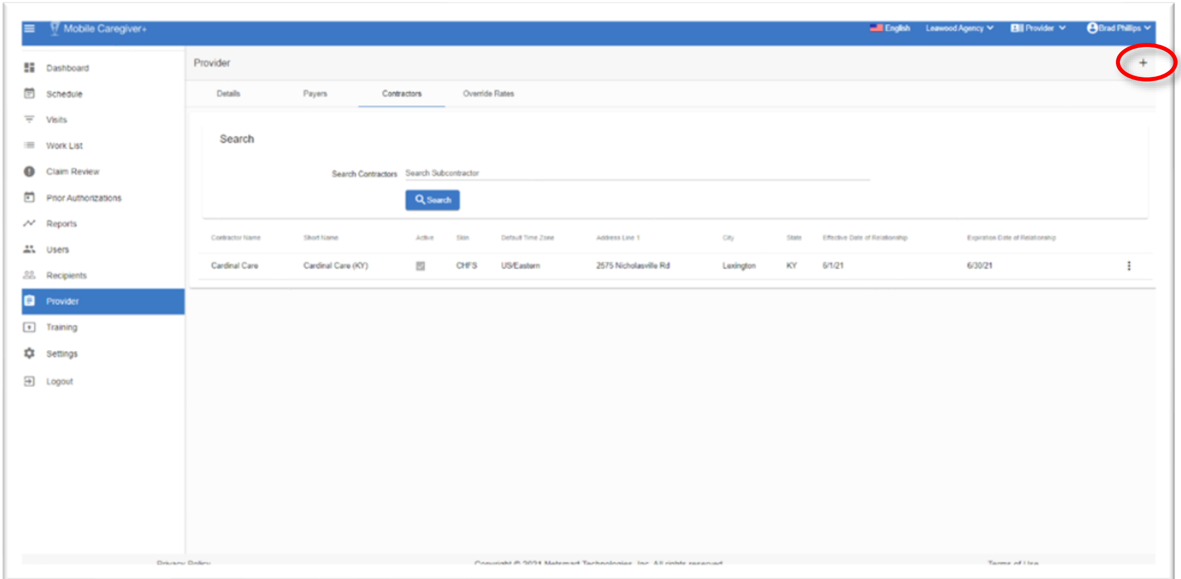
Note: You can only link to Contractors (providers) that already exist in the Mobile Caregiver+ System.

To link your agency with a Contractor:

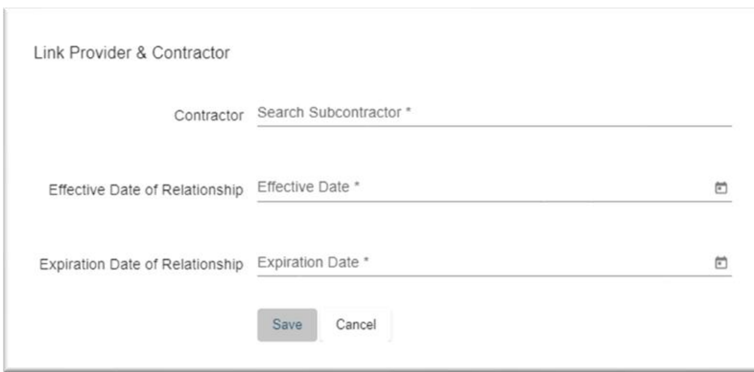
1. If your account is linked to multiple locations, click the agency name in the banner to select the agency/location you want to link to a Payer.
2. From the Main Menu, click **Provider**.



3. Click on the **Contractors** tab.



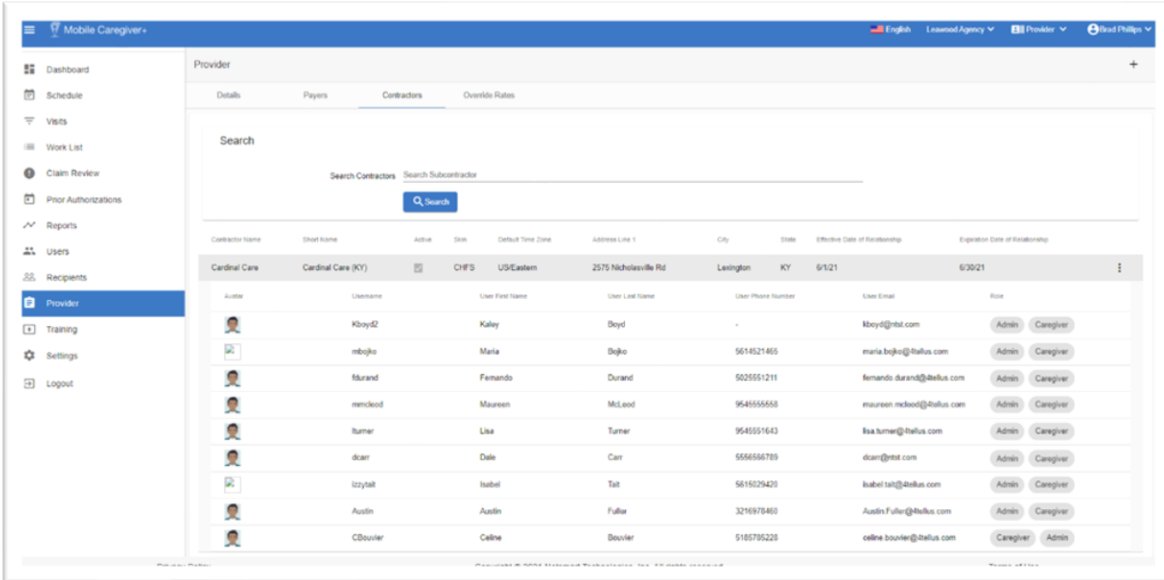
4. Click the **Add** icon, +, located in the upper right corner of the screen.



5. Click in the Contractor field, search for, and select a contractor from the list.
6. Manually type in or click the *calendar icon* and select the **Effective Date of Relationship** and enter the effective start date.
7. Manually type in or click the *calendar icon* and select the **Expiration Date of Relationship** and enter the expiration date.

   Contractors will be able to add Users. They will have access to your Recipients and will be able to schedule visits for them during this period only.

8. Click the blue Save command to link the contractor to your agency.



Related Topics

- Searching for a Provider
- Updating Provider Details
- Managing Payers
- Adding Payer Override Rates

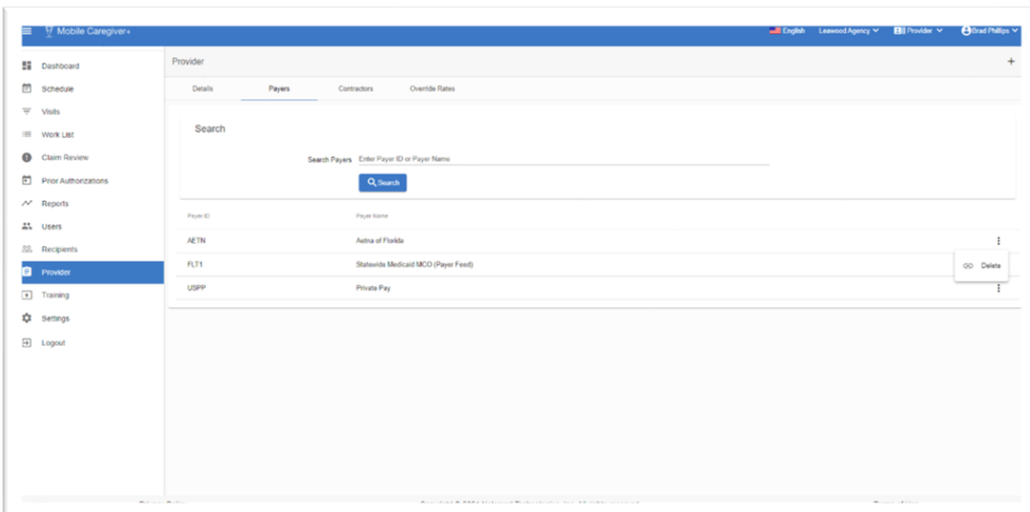
Deleting a Contractor

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Contractors* > Deleting a Contractor

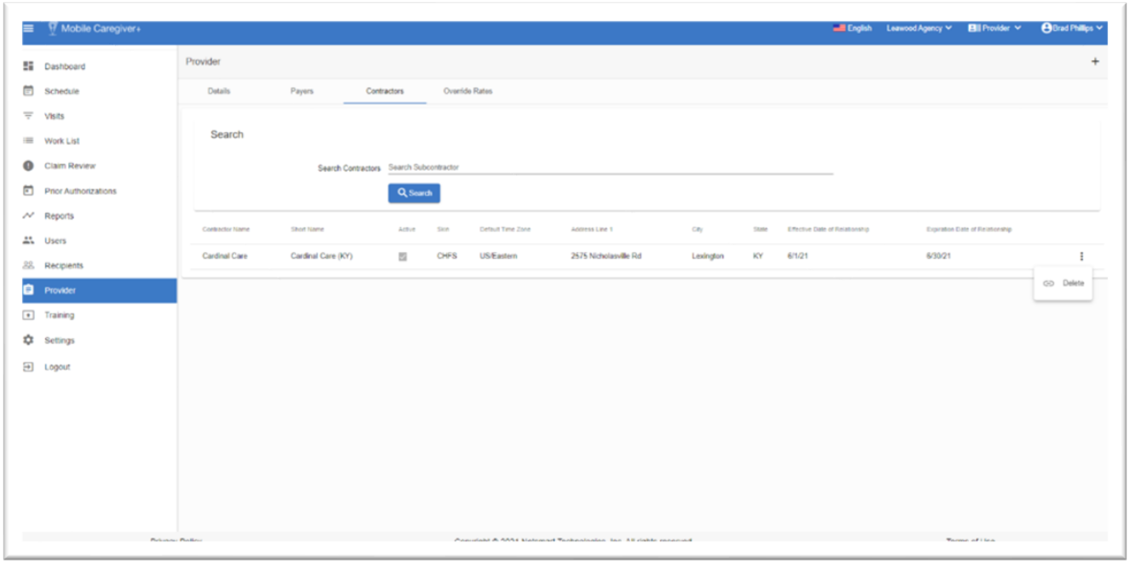
You can delete a Contractor at any time; when you do, they will no longer have access to your Recipients and can no longer schedule visits for them.

To delete a Contractor:

1. If your account is linked to multiple locations, click the agency name in the banner to select the agency/location you want to link to a Payer.
2. From the Main Menu, click **Provider**.



3. Click on the **Contractors** tab.



4. Click **Actions** icon, ⋮, for the Contractor you want to delete.
5. From the shortcut submenu, click **Delete.**

Related Topics

- *Searching for a Provider Agency*
- *Updating Provider Agency Details*
- *Managing Payers*
- *Updating Provider Details*
- *Overriding Payer Rates*

Managing Payer Override Rates

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > Managing Payer Override Rates

In order to accurately bill Payers, Netsmart allows provider agencies to add custom billing rates for rendered services, Override Rates, to the Mobile Caregiver+ Provider Portal.

Note: Providers must ensure that the effective date range for any custom Override Rate being added does not overlap with the effective date range for any existing Override Rate entry for the same **Procedure Code + Modifiers** – The system will not allow provider to add overlapping Override Rates.

In this section you will find information about:

- *Searching for a Specific Payer Override Rate*
- *Adding a Payer Override Rate*
- *Updating a Payer Override Rate*
- *Restoring a Payer Override Rate*
- *Deleting a Payer Override Rate*

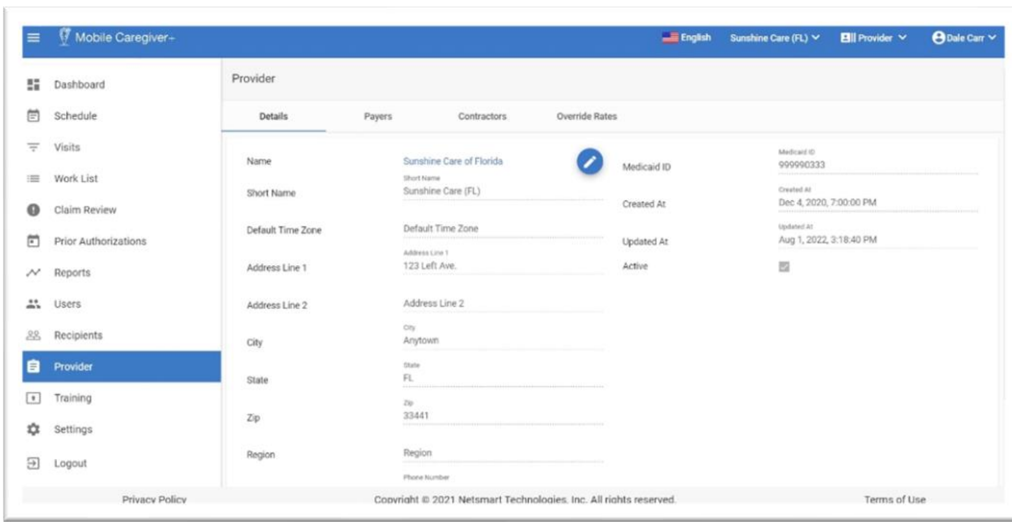
Searching for a Specific Payer Override Rate

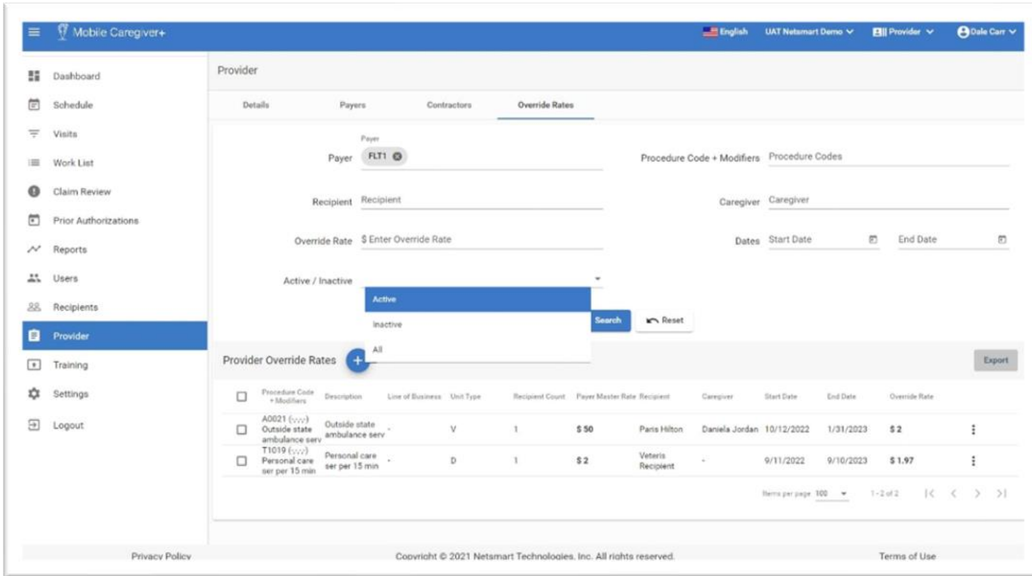
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Searching for a Specific Payer Override Rate

The Netsmart Mobile Caregiver+ Provider Portal will not allow providers to enter overlapping Override Entries. It is recommended that providers search for existing Override Rate entries before adding a new Override Rate entry.

To search for an existing Override Rate:

1. From the Main Menu, click **Provider**.





2. Click in the **Payer** field and select the Payer you are adding the custom rate for.
3. Click in the **Procedure Code** + **Modifiers** to select the Service Code, including any applicable Modifier(s).

   Note: By default, the system will not display Override Rates that are inactive based on the start/end dates. In order to search for inactive Override Rates, Providers must click in the ***Active/Inactive*** *field and select either* ***Inactive*** *or* ***All****.*

4. Enter any other optional filter parameters.
5. Click the blue **Search** command.

   You may have to scroll down to see the entire list of results.

Related Topics

- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

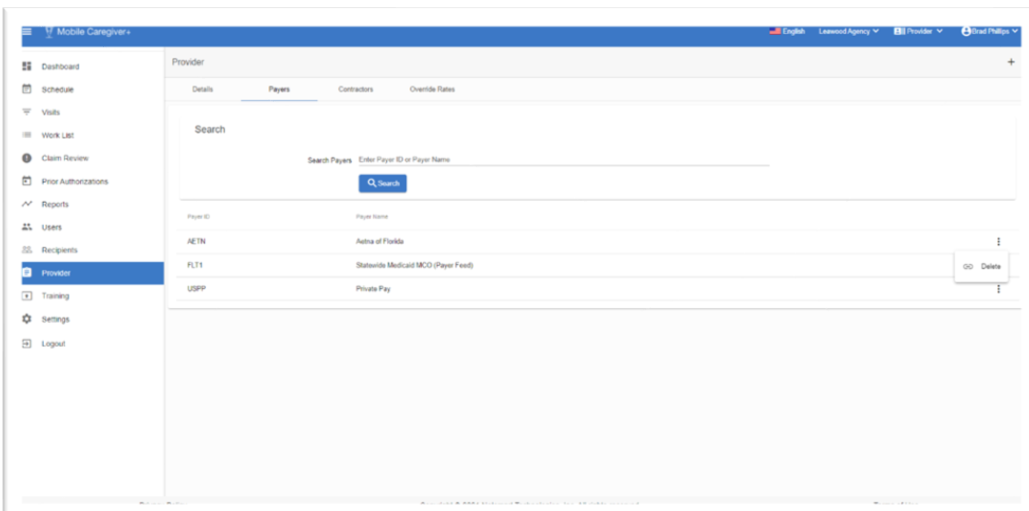
Adding a Payer Override Rate

You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Adding a Payer Override Rate

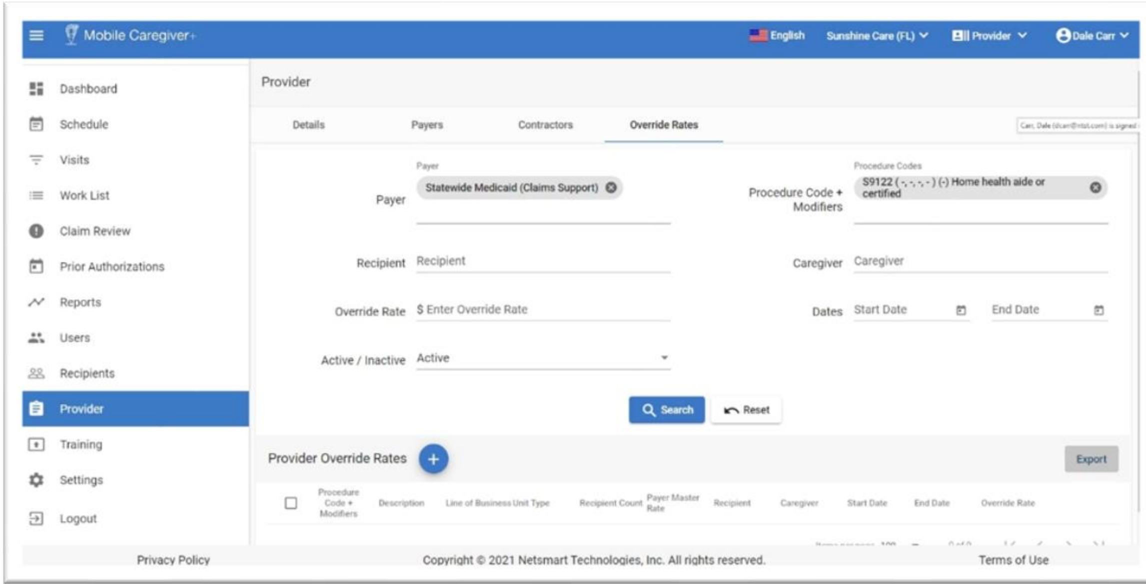
The Netsmart Mobile Caregiver+ Provider Portal will not allow Providers to enter overlapping Override Entries. It is recommended that providers search for existing Override Rate entries before adding a new Override Rate entry.

To add an override rate:

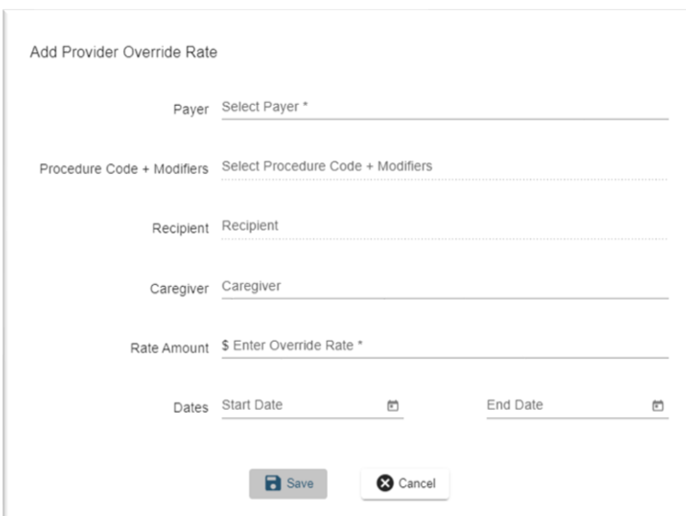
1. If your account is linked to multiple locations, click the agency name in the banner to select the agency/location you want to link to a Payer.
2. From the Main Menu, click **Provider**.



3. Click on the **Override Rates** tab.



4. Click the "**Add Provider Override Rates**" icon, , located at bottom left corner of the screen.



5. Click the **Payer** field and select the Payer whose rates you want to Override.
6. Click the **Procedure Code + Modifiers** field to select that service you want to add an override rate for.
7. If applicable, enter the **Recipient** and/or **Caregiver** that the custom rate applies to.
8. Click in the **Rate Amount** field and enter the new rate.

The Override rate being entered must either be equal to, or less than, the maximum rate set by the Payer – The custom rate cannot be greater than the maximum rate set by the Payer.

9. Manually type in, or click the calendar, to enter the **Start Date** (effective) for the Override rate
10. Manually type in, or click the calendar, to enter the **End Date** for the Override Rate.

    *Note: Providers must ensure that the effective date range for any custom Override Rate being added does not overlap with the effective date range for any existing Override Rate entry for the same **Procedure Code + Modifiers** – The system will not allow providers to add overlapping Override Rates for the same service code.*

11. Click the blue **Save** command.

Related Topics

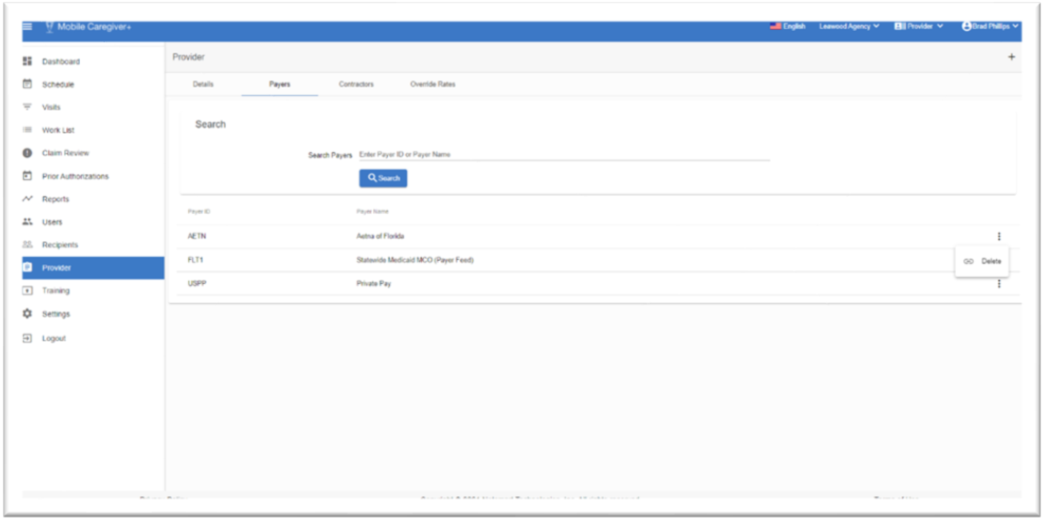
- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Updating a Payer Override Rate

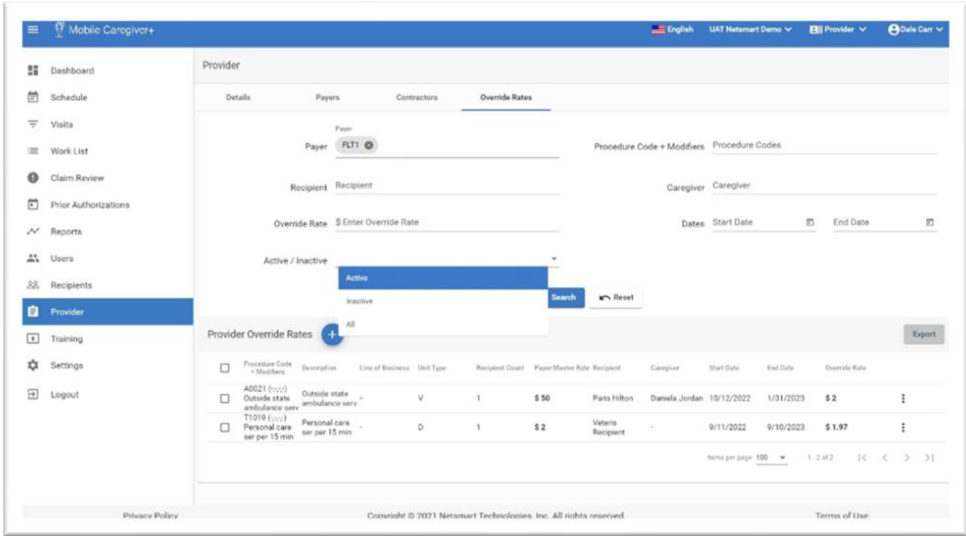
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Updating a Payer Override Rate

To update a Payer Override Rate:

1. From the Main Menu, click **Provider**.



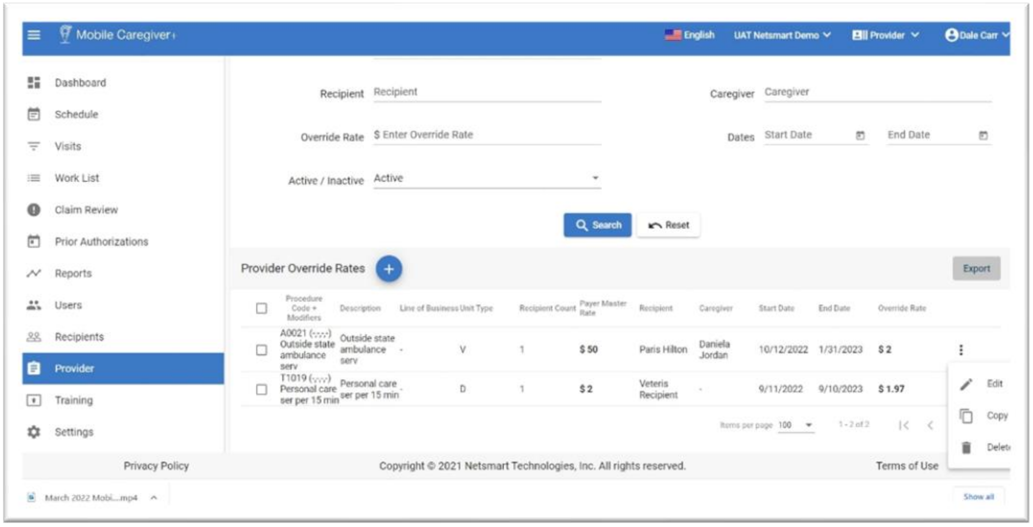
2. Click on the **Override Rates** tab.



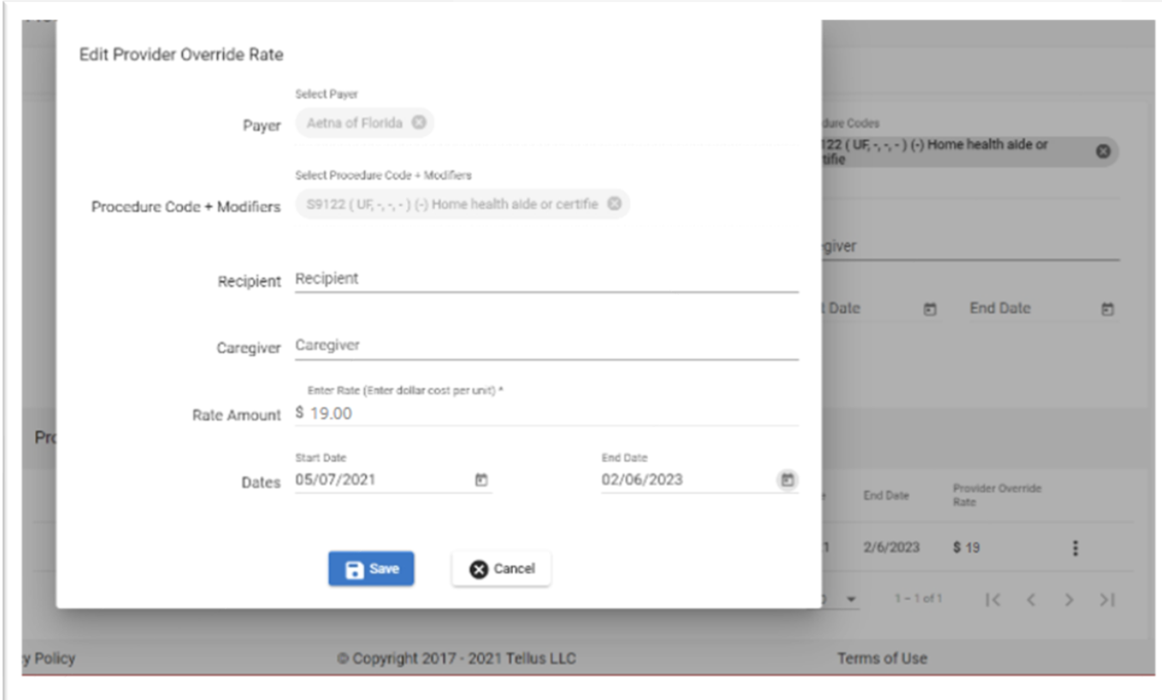
3. Use the field in the header to *Search for the override rate* you want to update – Select the Payer and any other optional filter parameters.

*Note: By default, the system will not display Override Rates that are inactive based on the start/end dates. In order to search for and edit inactive Override Rates, Providers must click in the **Active/Inactive** field and select either **Inactive** or **All**.*

4. Click the blue **Search** command.



5. Click on the **Actions** icon, ⋮, on the right side of the Override rate you want to edit.
6. From the shortcut submenu, click **Edit**.



7. Make changes as needed
8. Click the blue **Save** command to save the changes.

   *Note: Providers must ensure that the effective date range for any custom Override Rate being added does not overlap with the effective date range for any existing Override Rate entry for the same **Procedure Code + Modifiers**.*

Related Topics

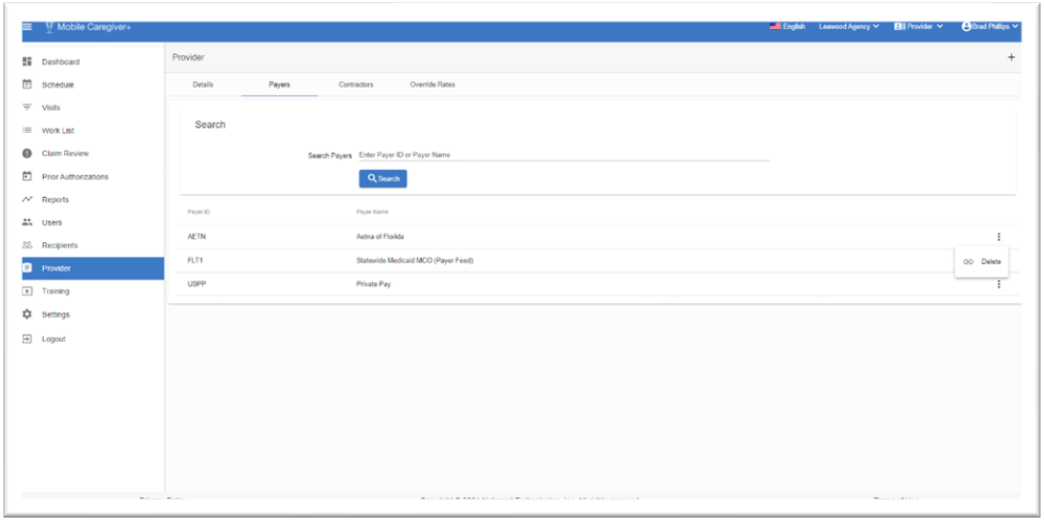
- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Deleting a Payer Override Rate

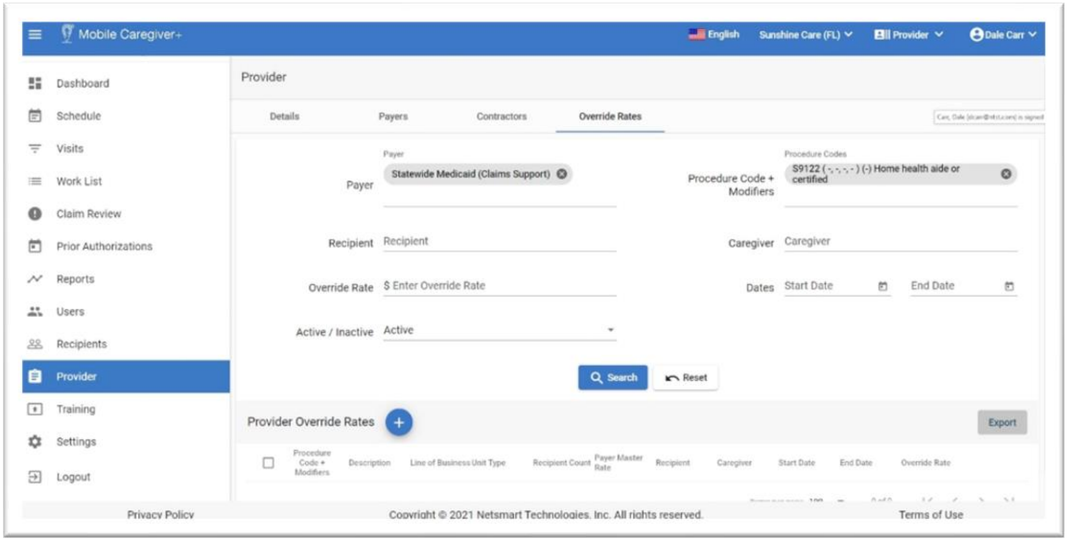
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Managing Provider Agencies* > *Managing Payer Override Rates* > Deleting a Payer Override Rate

To delete a Payer Override Rate:

1. If your account is linked to multiple locations, click the agency name in the banner to select the agency/location you want to link to a Payer.
2. From the Main Menu, click **Provider**.



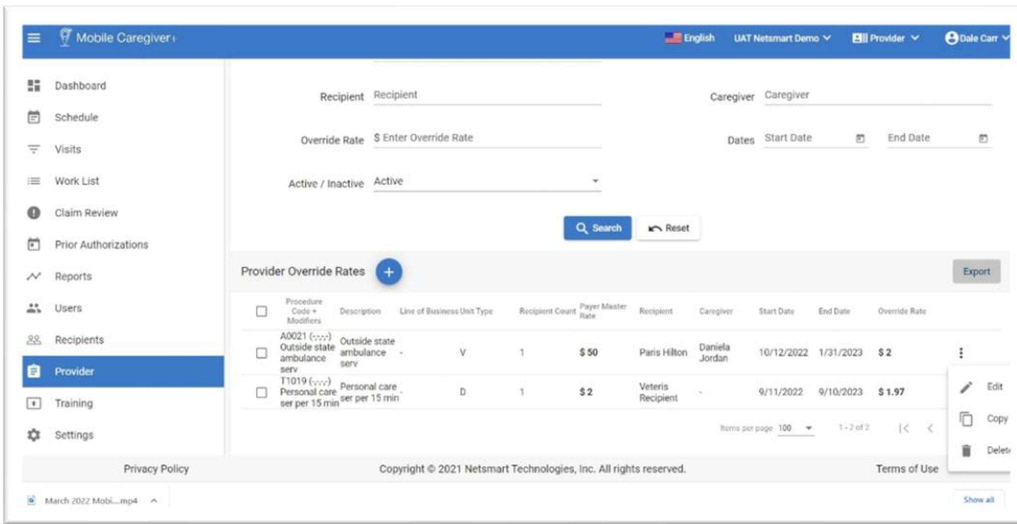
3. Click on the **Override Rates** tab.



4. Use the field in the header to Search for the override rate you want to delete – Select the Payer and any other optional filter parameters.

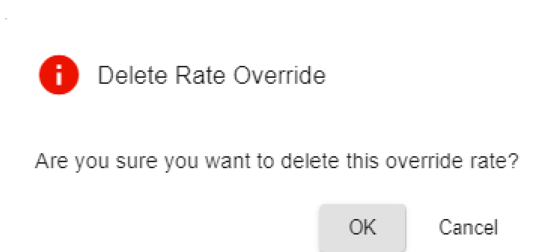
   *Note: By default, the system will not display Override Rates that are inactive based on the start/end dates. In order to search for inactive Override Rates, Providers must click in the **Active/Inactive** field and select either **Inactive** or **All**.*

5. Click the blue **Search** command.



6. Click on the Actions icon, ⋮, on the right side of the Override rate you want to edit.

7. From the shortcut submenu, click Delete.



8. Click OK to confirm and delete the Override Rate.

Related Topics

- *Updating Provider Agency Details*
- *Managing Payers*
- *Managing Contractors*
- *Overriding Payer Rates*

Reporting

You are here: *Mobile Caregiver+ Provider Portal User Guide* > Reporting

Click a topic below:

Generating a Report

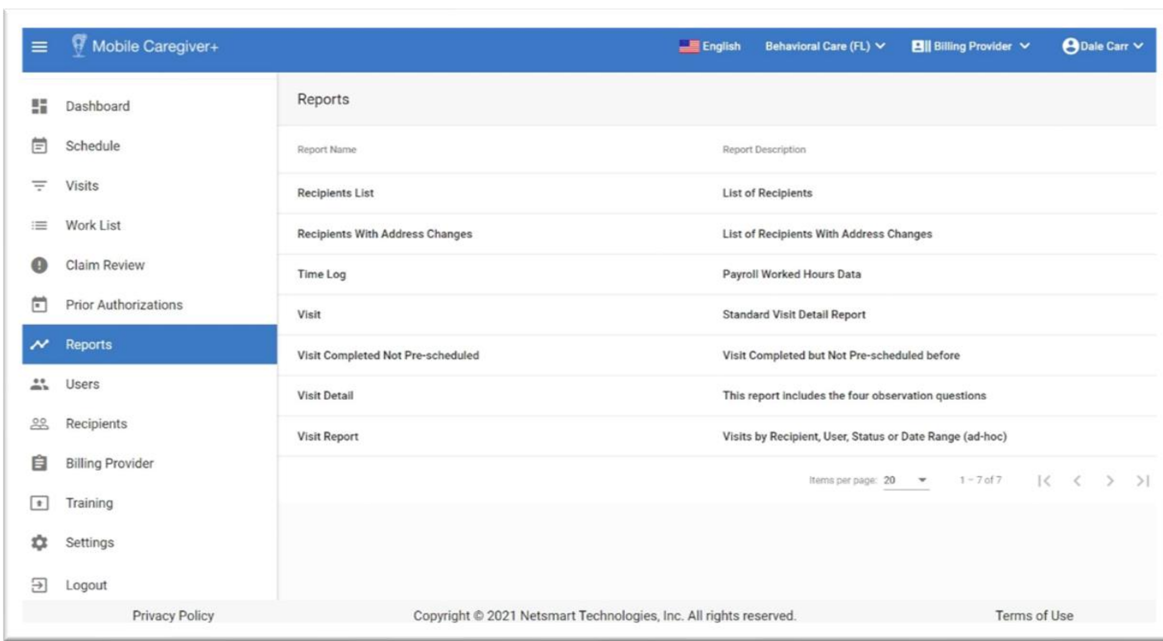
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Reporting* > Generating a Report

The Provider Portal offers several reports, including, but not limited to, the Time Log report that gives you a list of hours worked by a Caregiver, and the Visit Report that lets you see a list of completed tasks for Recipients.

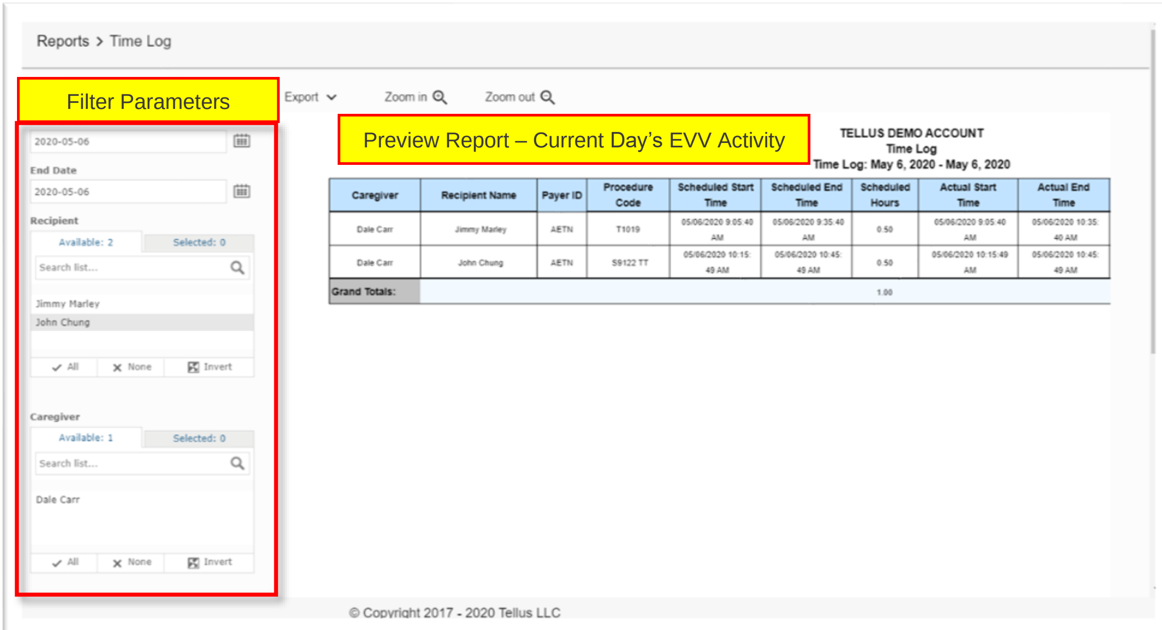
The Time Log report is used as an example in the following instructions, demonstrating how to generate a report. Filters are different for each report but making selections and generating all reports is the same.

To generate one of the standardized reports:

1. From the Main Menu, click **Reports**.

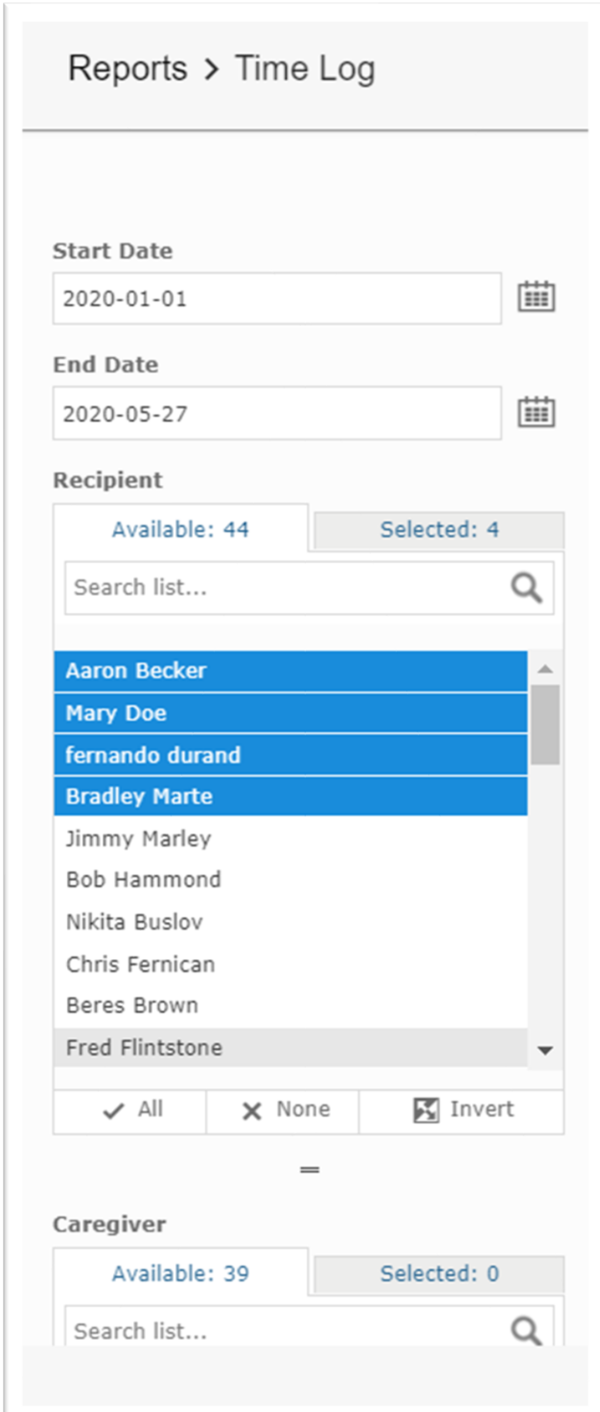


2. Click the name of the report you want to generate.



The system will generate a report based on the current days EVV activity.

3. Configure filter parameters – Use the fields located to the left of the sample report to configure custom filter parameters for your report.
   - For some reports, like the Time Log Report shown, you may be able to enter a range, such as dates, for the data you want to see. Use the dropdown calendar for the Start Date and End Date to choose the date range you want to see payroll for.
   - Filters like Recipient that have tabs titled Available and Selected allow you to select one or more Recipients to include in the report:



- Click ***All*** at the bottom of the list to add all data elements that appear on the **Available** tab.
- Click on individual elements on the **Available** tab to select and unselect elements what will be included in the report. The total number of selections will be displayed on the **Selected** tab.
- Remove all selected data elements by clicking ***None*** on the **Available** tab; the Selected tab will be updated accordingly.

4. Scroll down and click the blue **Apply** command to generate the report.

   Use the buttons listed below to view the contents of the report. Zoom options appear at the top of the page; paging options appear at the bottom of the page. You may need to scroll down to see them. You can also *export the report*.

Button	Description
Zoom in	Zoom in to enlarge report.
Zoom out	Zoom out to reduce size of report.
Page 2 of 36	See the number of the page displayed as well as the total number of pages in the report.
|<	Return to the first page of the report.
<	Move back one page.
>	Move forward one page.
>|	Move to last page of the report.

Button Description

Related Topic

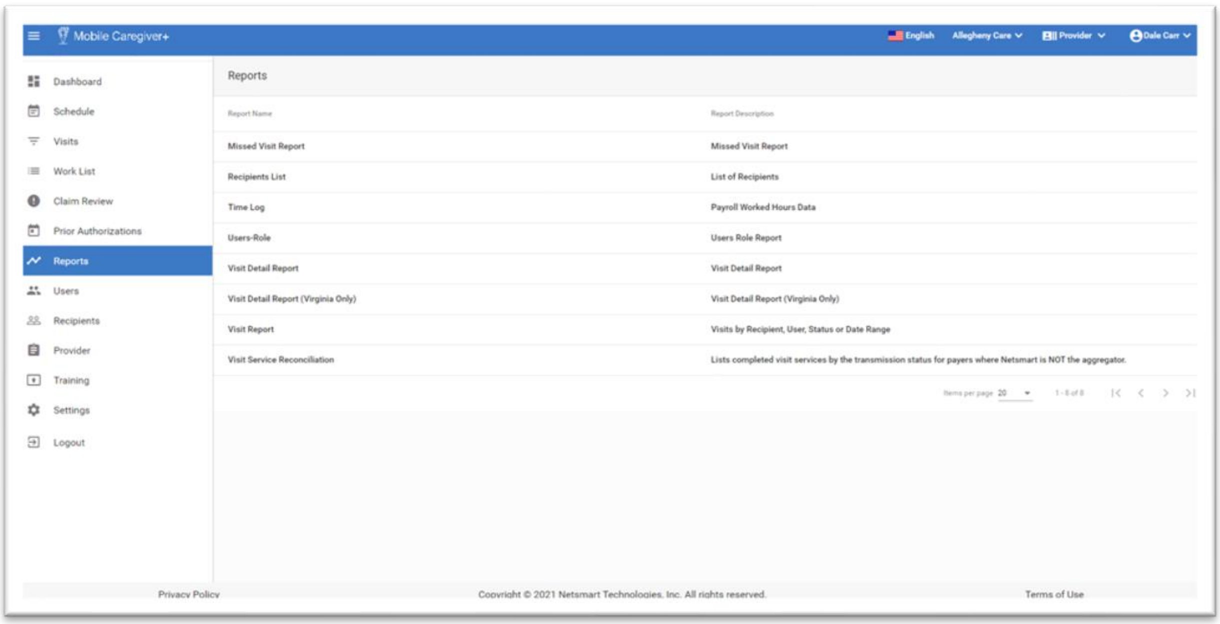
- *Exporting a Report*

Exporting a Report

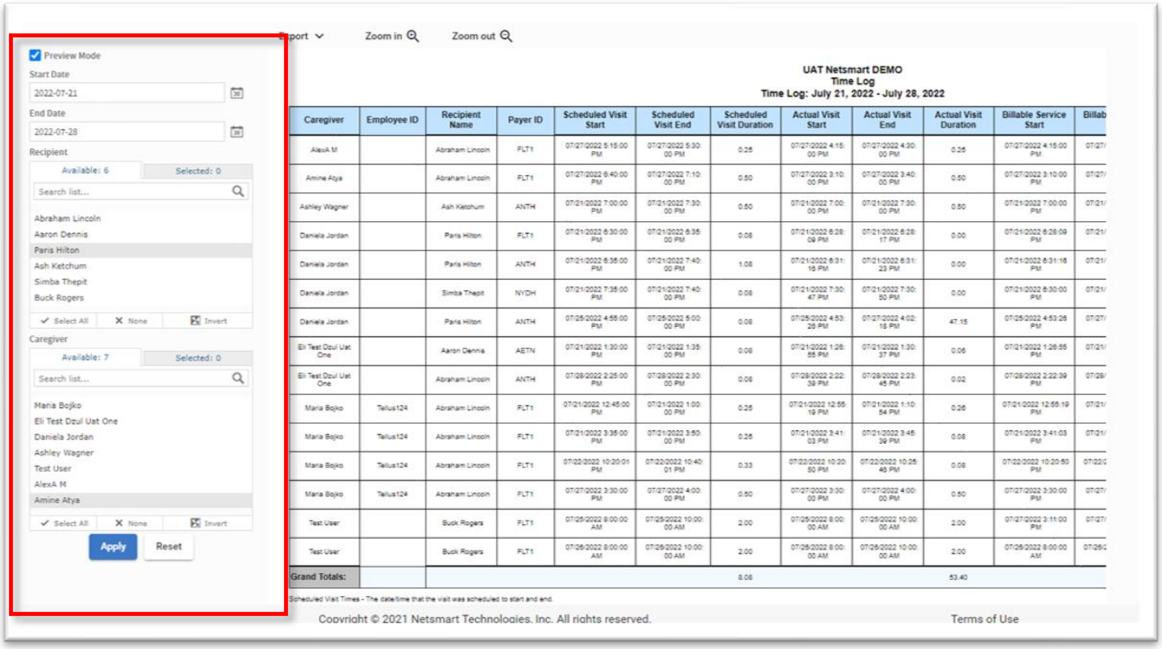
You are here: *Mobile Caregiver+ Provider Portal User Guide* > *Reporting* > Exporting a Report

To generate one of the standardized reports:

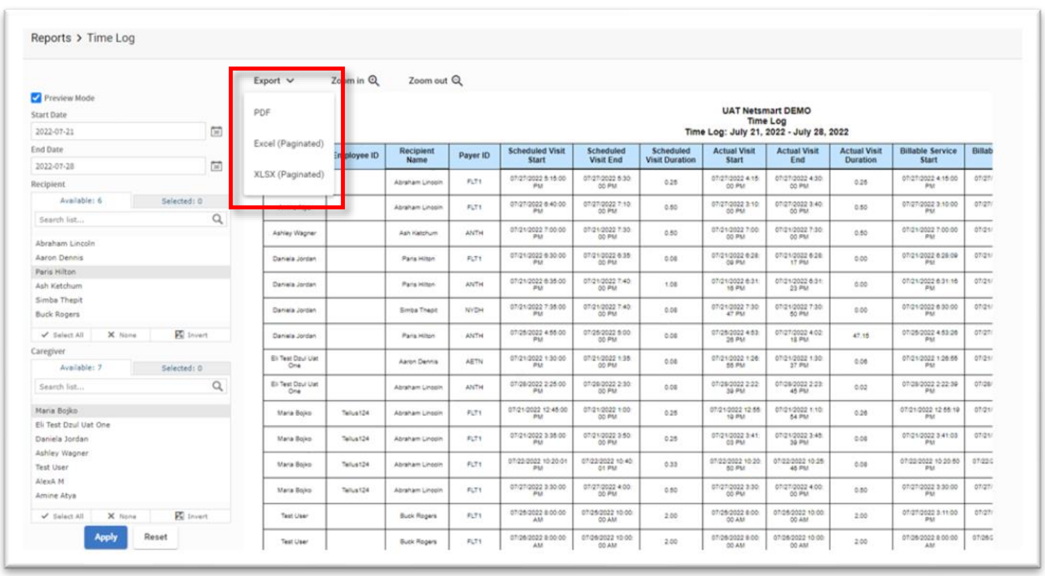
1. From the Main Menu click **Reports**.



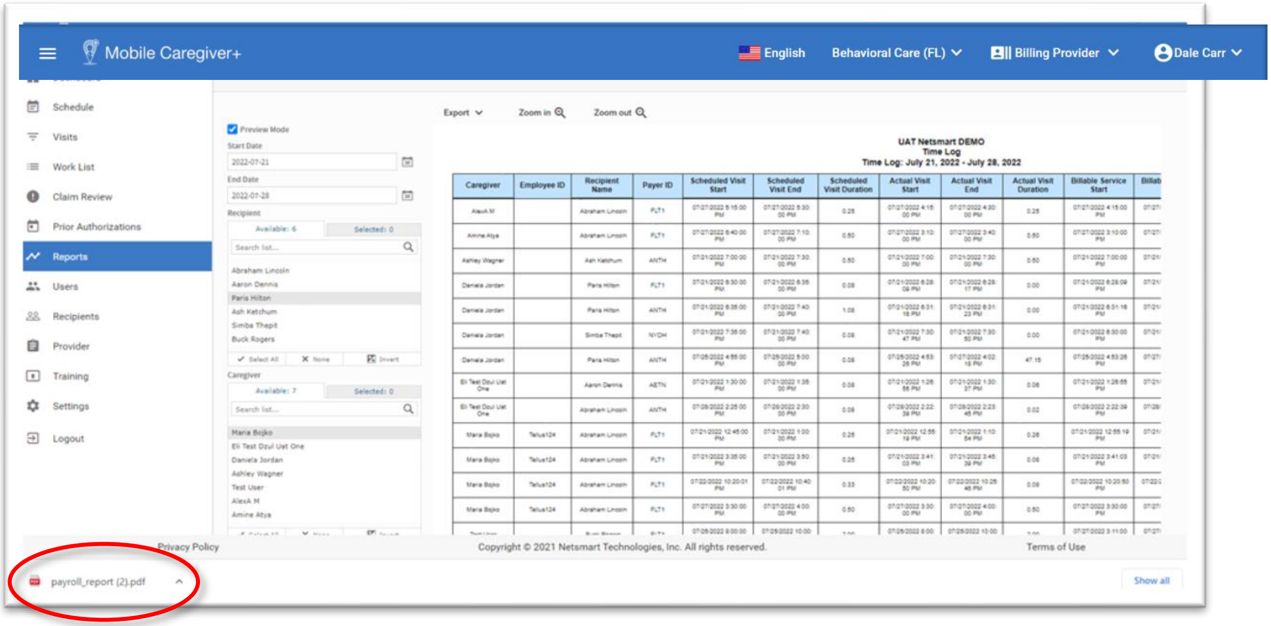
2. Click the name of the report you want to generate.
3. Use the filters to select the data you want included on your report and then click **Apply**.



4. Click the **Export** dropdown and select the format for your report.



When the report is downloaded, it will appear at the bottom left of your screen.



5. Click the download indicator to open the report.

Related Topic

[Generating a Report]

Mobile Caregiver+ Provider Report List

Missed Visit Report

Providers can use the **Missed Visit Report** to view analytic data for canceled visits, including the reasons for canceling visits and actions taken.

The **Missed Visit Report** allows providers to view analytics for canceled visits, to identify the most commonly selected Reasons and Actions Taken for canceled visits; this information provides insights related to potential causes of "non-adherence" to treatment plans, including but not limited to identifying Caregivers and/or Recipients with high numbers of canceled visits.

By default, the **Missed Visit Report** displays analytic data for visits that were canceled for the current day.

The report will the display following data for each visit: Recipient Last Name, Recipient First Name, Recipient Medicaid ID, Recipient Member ID, Recipient DOB, Recipient Diagnosis Code, Payer, Service Code, Visit ID, Caregiver, Scheduled Start, Scheduled End, Missed Visit Reason Code, Missed Visit Reasons Notes, Missed Visit Action, Missed Visit Action Notes.

Providers can customize the default report using the controls on the left to select the following parameters:

- The Start Date and End Date for Missed visits.
- Caregiver(s).
- Recipient(s).
- Missed Visit Reason(s).
- Missed Visit Action(s).

MISSED VISITS REPORT
Date Range: March 1, 2022 - June 21, 2022
Report Date: 06/21/22

Record Count	Recipient Last Name	Recipient First Name	Recipient Medicaid ID	Recipient Member ID	Recipient DOB	Recipient Diagnoses	Payer	Service Code	Visit ID	Caregiver	Scheduled Start	Scheduled End	Missed Visit Reason	Missed Visit Reason Notes ▼	Missed Visit Action	Missed Visit Action Notes ▼
1	Alualu	Cadence	1111110005		03/31/1955		FLT1	S9122	0922505733	Dale Carr	05/10/2022 12:55:00 PM	05/10/2022 1:25:00 PM	OTHR	training	SCHD	training
2	Berry	Della	1111110006		10/07/1989		FLT1	S9122	2464288079	Dale Carr	04/12/2022 11:00:00 AM	04/12/2022 12:00:00 PM	MCAN	Recipient refused care	SCHS	schedul
3	Marie	Sophia	85971325	987654321	04/05/1986		FLT1	S9122	0155591313	Isabella Khatri Schissler	04/03/2022 5:00:00 PM	04/03/2022 8:00:00 PM	MCAN	Recipient did not need services this day.	SCHD	Rescheduled for April 4 at same time.
4	Berry	Della	1111110006		10/07/1989		FLT1	S9122	2245873858	Dale Carr	05/26/2022 11:00:00 AM	05/26/2022 12:00:00 PM	OTHR	prov prt	OTHR	prov prt
5	Berry	Della	1111110006		10/07/1989		FLT1	S9122	2023361133	Dale Carr	05/12/2022 11:00:00 AM	05/12/2022 12:00:00 PM	OTHR	Provider Portal Training	OTHR	Provider Portal Training
6	Berry	Della	1111110006		10/07/1989		FLT1	S9122	3041927304	Dale Carr	04/28/2022 11:00:00 AM	04/28/2022 12:00:00 PM	MCAN	Provider Portal Training	OTHR	Provider Portal Training

Recipient List Report

Providers can use the **Recipient List Report** to view demographic data for all active Recipients that are enrolled with an agency; this is a census report can be used to view and audit the count and accuracy of the EVV profiles for Recipients that are enrolled with a provider agency.

The **Recipient List Report** will the display following data for each record: Recipient Name, Date of Birth, Gender, Recipient Address, Recipient Phone Number, Emergency Contact Name, Emergency Contact Phone.

Providers can customize the default report using the controls on the left to select the following parameters:

- Recipient(s).
- Gender.

Recipient List

Account Name	R.Count	Recipient Name	Date of birth	Gender	Recipient Address	Recipient Phone Number	Emergency Contact Name	Emergency Contact Phone
Sunshine Care of Florida								
	1	Anna Adeniyi	Oct 3, 1983	FEMALE				
	2	Anna Adeniyi	Oct 3, 1983	FEMALE	3651 FAU Boulevard Boca Raton FL 33431	(305) 745-4646	Adele Smith	3057845454
	3	Betsy Roethlisberger	Nov 15, 1951	FEMALE				
	4	Betsy Roethlisberger	Nov 15, 1951	FEMALE				
	5	Buck Rogers	Jul 4, 1945	MALE	800 Fairway Drive Deerfield Beach FL 33441	(555) 656-6789	Wilma Deering	15556566789
	6	Cadence Alualu	Mar 31, 1955	FEMALE				

Time Log Report

Provider can use the **Time Log Report** to view scheduled, actual, and billable reported time log data by Caregiver for completed visits.

By default, the **Time Log Report** displays time reported time log for visit completed in the current day by scheduled, actual and billable date and time.

The report will the display following data for each Completed visit: Caregiver, Employee ID, Recipient Name, Payer ID, Scheduled Start, Scheduled End, Scheduled Hours, Actual Start Time, Actual End Time, Actual Hours, Billable Start Time, Billable End Time, Billable Hours, Billable-Actual Service Duration.

Providers can customize the default report using the controls on the left to select the following parameters:

- The Start Date and End Date for Completed visits.
- Recipient(s).
- Caregiver(s).

UAT Netsmart DEMO
Time Log
Time Log: July 27, 2022 - July 27, 2022

Caregiver	Employee ID	Recipient Name	Payer ID	Scheduled Visit Start	Scheduled Visit End	Scheduled Visit Duration	Actual Visit Start	Actual Visit End	Actual Visit Duration	Billable Service Start	Billable Service End	Billable Service Duration	Billable-Actual Service Duration
AlexA M		Abraham Lincoln	FLT1	07/27/2022 5:15:00 PM	07/27/2022 5:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	0.25	07/27/2022 4:15:00 PM	07/27/2022 4:30:00 PM	0.25	0.00
Amine Atya		Abraham Lincoln	FLT1	07/27/2022 6:40:00 PM	07/27/2022 7:10:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	0.50	07/27/2022 3:10:00 PM	07/27/2022 3:40:00 PM	0.50	0.00
Maria Bojko	Tellus124	Abraham Lincoln	FLT1	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	07/27/2022 3:30:00 PM	07/27/2022 4:00:00 PM	0.50	0.00
Grand Totals:						1.25			1.25			1.25	0.00

Scheduled Visit Times - The date/time that the visit was scheduled to start and end.
Actual Visit Times - The date/time that the EVV solution captured for visit check-in & check-out.
Billable Times - The date/time that is to be submitted on the claim, may be adjusted by the billing provider.

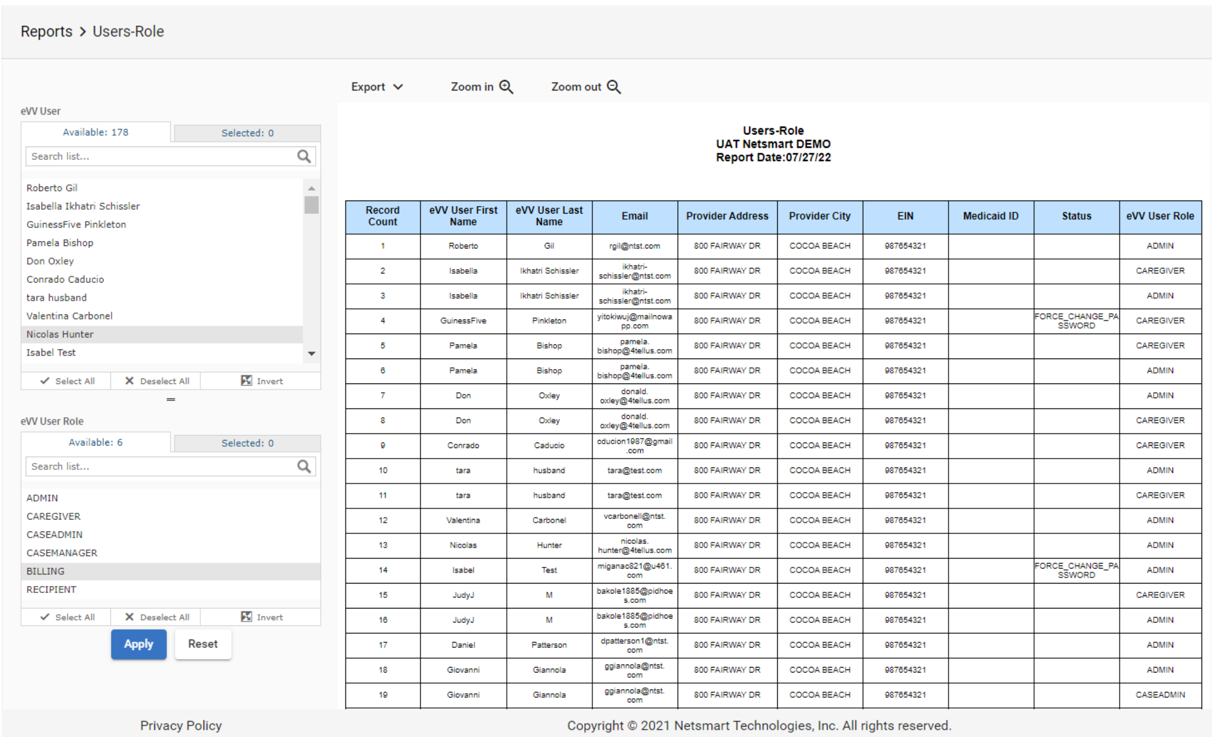
User Role Report

Providers can use the **User Role Report** to audit users' access rights to the Mobile Caregiver+ Provider Portal; this report can be used to identify user that possess unwarranted access rights.

The **User Role Report** displays Users and their related roles by provider. The report will the display following data for each user: EVV User First Name, EVV User Last Name, Email, Provider Address, EIN, Medicaid ID, Status, EVV User Role.

Provider can configure and select the following report parameters to filter and display the User Role Reports for specific Users:

- Mobile Caregiver+ EVV User.
- EVV User Role



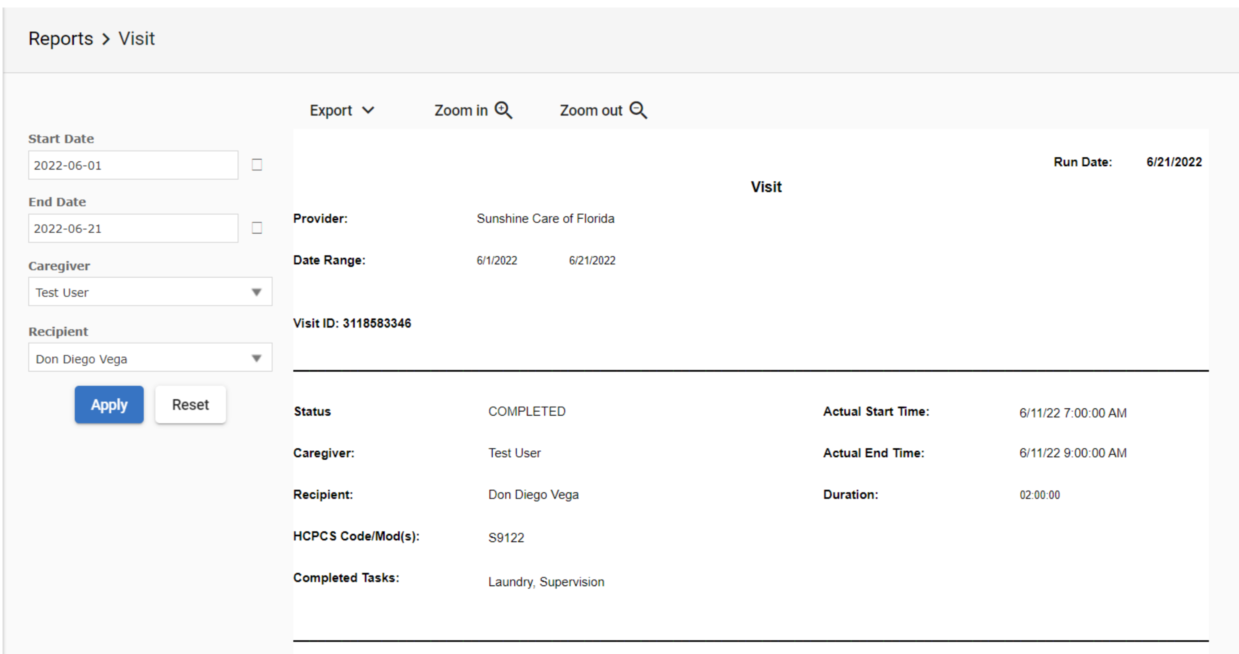
Record Count	eVV User First Name	eVV User Last Name	Email	Provider Address	Provider City	EIN	Medicaid ID	Status	eVV User Role
1	Roberto	Gil	rgil@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
2	Isabella	Ikhatri Schissler	ikhatri-schissler@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			CAREGIVER
3	Isabella	Ikhatri Schissler	ikhatri-schissler@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
4	GuinessFive	Pinkleton	yitokiwuj@mailnowapp.com	800 FAIRWAY DR	COCOA BEACH	987654321		FORCE_CHANGE_PASSWORD	CAREGIVER
5	Pamela	Bishop	pamela.bishop@4tellus.com	800 FAIRWAY DR	COCOA BEACH	987654321			CAREGIVER
6	Pamela	Bishop	pamela.bishop@4tellus.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
7	Don	Oxley	donald.oxley@4tellus.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
8	Don	Oxley	donald.oxley@4tellus.com	800 FAIRWAY DR	COCOA BEACH	987654321			CAREGIVER
9	Conrado	Caducio	cducion1987@gmail.com	800 FAIRWAY DR	COCOA BEACH	987654321			CAREGIVER
10	tara	husband	tara@test.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
11	tara	husband	tara@test.com	800 FAIRWAY DR	COCOA BEACH	987654321			CAREGIVER
12	Valentina	Carbonel	vcarbonell@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
13	Nicolas	Hunter	nicolas.hunter@4tellus.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
14	Isabel	Test	miganac821@u461.com	800 FAIRWAY DR	COCOA BEACH	987654321		FORCE_CHANGE_PASSWORD	ADMIN
15	JudyJ	M	bakole1885@pidhoes.com	800 FAIRWAY DR	COCOA BEACH	987654321			CAREGIVER
16	JudyJ	M	bakole1885@pidhoes.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
17	Daniel	Patterson	dpatterson1@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
18	Giovanni	Giannola	ggiannola@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			ADMIN
19	Giovanni	Giannola	ggiannola@ntst.com	800 FAIRWAY DR	COCOA BEACH	987654321			CASEADMIN

Visit Detail Report

The **Visit Report** allows providers to view and print a page per day report for a selected Caregiver and recipient specific to service delivered. The report will display all service details for individual completed visit, including but not limited to, completed services, tasks, location of service, time services started and ended, recorded signatures, etc. This report can be printed to add additional signatures.

Provider must configure and select the following report parameters to filter and display the Visit Reports for specific visits:

- The Start Date and End Date for the Completed visits.
- Caregiver.
- Recipient.

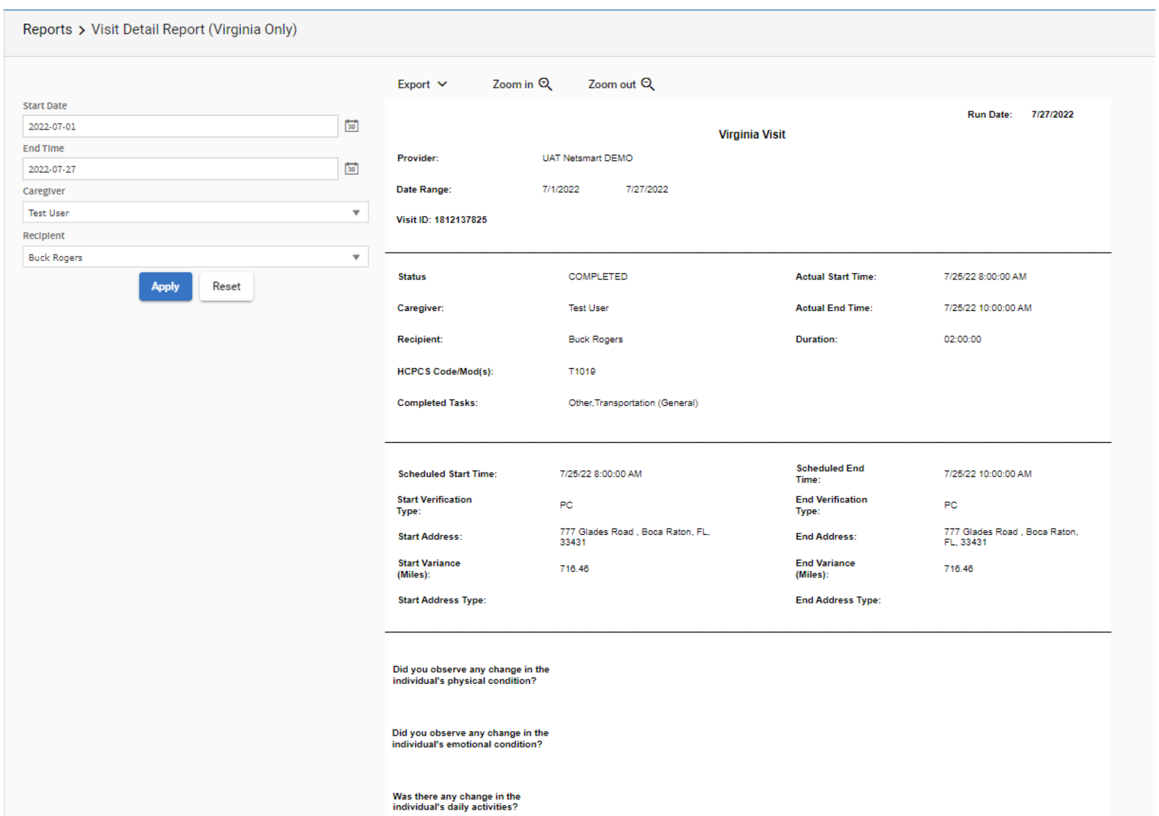


Visit Detail Report (Virginia Only)

The **Visit Report** allows providers to view and print a page per day report for a selected Caregiver and recipient specific to service delivered. The report will display all service details for individual completed visit, including but not limited to, completed services, tasks, location of service, time services started and ended, recorded signatures, etc. This report includes four health survey observation questions and can be printed to add additional signatures.

Provider must configure and select the following report parameters to filter and display the Visit Reports for specific visits:

- The Start Date and End Date for the Completed visits.
- Recipient.
- Caregiver.



Visit Report

The Visit Report display scheduling and actual recorded service details for all scheduled visits; Providers can use this report to actively track/review scheduled and reported EVV activity for all scheduled visits, including the current visit status, the time a visit was started/ended, the location where a visit started/ended, etc.

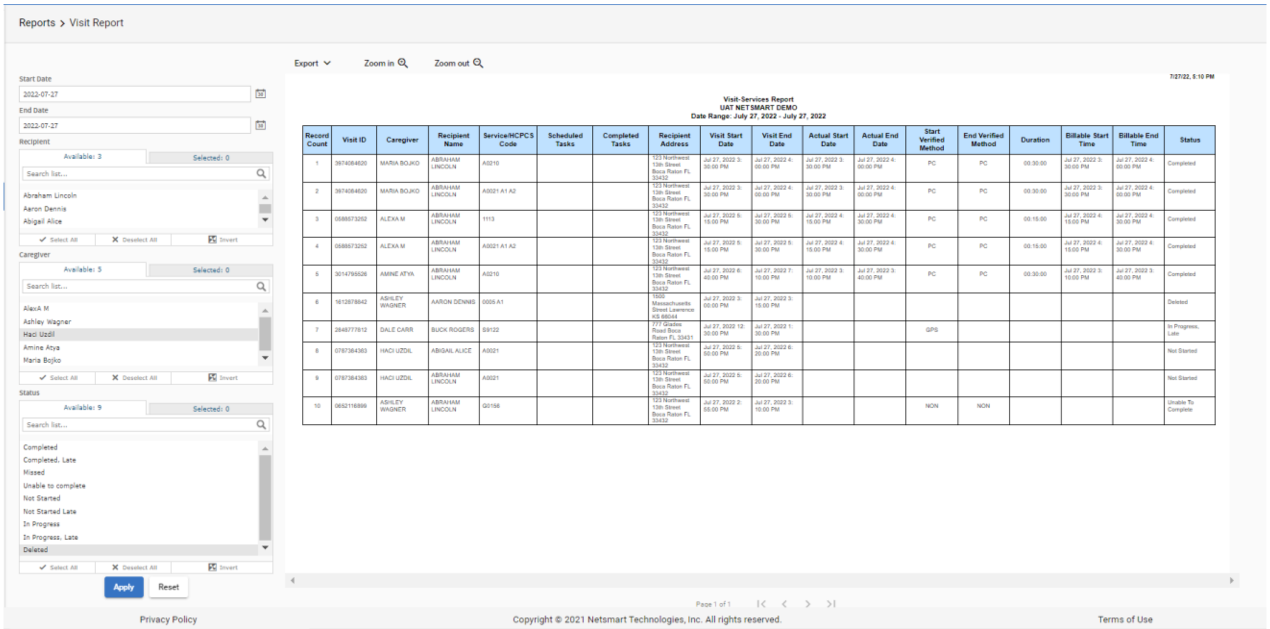
Providers can use the **Visit Report** to audit service delivery (adherence to treatment plans).

Providers can review the reported **Start Verification Method** and **End Verified Method** data to audit the usage of compliant EVV devices for completed visits; this information can be used to identify Caregivers who may require additional training, coaching, or other corrective actions to increase EVV usage for completing scheduled visit.

By default, the Visit Report displays a list of scheduled visits for the current day. The report will the display following data for each scheduled visit: Visit ID, Caregiver, Recipient Name, Service/HCPCS Code, Scheduled Tasks, Completed Tasks, Recipient Address, Visit Start Date, Visit End Date, Actual Start Date, Actual End Date, Start Verified Method, Start Verification Method, End Verified Method, Duration, Billable Start Time, Billable End Time, Status.

Providers can customize the default report using the controls on the left to select the following parameters:

- The Start Date and End Date for scheduled visits.
- Recipient(s).
- Caregiver(s).
- Status(es).



Visit-Services Report
UAT NETSMART DEMO
Date Range: July 27, 2022 - July 27, 2022

Record Count	Visit ID	Caregiver	Recipient Name	Service/HCPCS Code	Scheduled Tasks	Completed Tasks	Recipient Address	Visit Start Date	Visit End Date	Actual Start Date	Actual End Date	Start Verified Method	End Verified Method	Duration	Billable Start Time	Billable End Time	Status
1	3974064620	MARIA BOJKO	ABRAHAM LINCOLN	A0210			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 3:30:00 PM	Jul 27, 2022 4:00:00 PM	Jul 27, 2022 3:30:00 PM	Jul 27, 2022 4:00:00 PM	PC	PC	00:30:00	Jul 27, 2022 3:30:00 PM	Jul 27, 2022 4:00:00 PM	Completed
2	3974064620	MARIA BOJKO	ABRAHAM LINCOLN	A0021 A1 A2			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 3:30:00 PM	Jul 27, 2022 4:00:00 PM	Jul 27, 2022 3:30:00 PM	Jul 27, 2022 4:00:00 PM	PC	PC	00:30:00	Jul 27, 2022 3:30:00 PM	Jul 27, 2022 4:00:00 PM	Completed
3	0588573252	ALEXA M	ABRAHAM LINCOLN	1113			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 5:15:00 PM	Jul 27, 2022 5:30:00 PM	Jul 27, 2022 4:15:00 PM	Jul 27, 2022 4:30:00 PM	PC	PC	00:15:00	Jul 27, 2022 4:15:00 PM	Jul 27, 2022 4:30:00 PM	Completed
4	0588573252	ALEXA M	ABRAHAM LINCOLN	A0021 A1 A2			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 5:15:00 PM	Jul 27, 2022 5:30:00 PM	Jul 27, 2022 4:15:00 PM	Jul 27, 2022 4:30:00 PM	PC	PC	00:15:00	Jul 27, 2022 4:15:00 PM	Jul 27, 2022 4:30:00 PM	Completed
5	3014795526	AMINE ATYA	ABRAHAM LINCOLN	A0210			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 6:40:00 PM	Jul 27, 2022 7:10:00 PM	Jul 27, 2022 3:10:00 PM	Jul 27, 2022 3:40:00 PM	PC	PC	00:30:00	Jul 27, 2022 3:10:00 PM	Jul 27, 2022 3:40:00 PM	Completed
6	1612878842	ASHLEY WAGNER	AARON DENNIS	0005 A1			1500 Massachusetts Street Lawrence KS 66044	Jul 27, 2022 3:00:00 PM	Jul 27, 2022 3:15:00 PM								Deleted
7	2848777812	DALE CARR	BUCK ROGERS	S9122			777 Glades Road Boca Raton FL 33431	Jul 27, 2022 12:30:00 PM	Jul 27, 2022 1:30:00 PM			GPS					In Progress, Late
8	0787384383	HACI UZDIL	ABIGAIL ALICE	A0021			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 5:50:00 PM	Jul 27, 2022 6:20:00 PM								Not Started
9	0787384383	HACI UZDIL	ABRAHAM LINCOLN	A0021			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 5:50:00 PM	Jul 27, 2022 6:20:00 PM								Not Started
10	0652116899	ASHLEY WAGNER	ABRAHAM LINCOLN	G0156			123 Northwest 13th Street Boca Raton FL 33432	Jul 27, 2022 2:55:00 PM	Jul 27, 2022 3:10:00 PM			NON	NON				Unable To Complete

Visit Service Reconciliation Report

The **Visit Service Reconciliation Report** allows providers to view the current transmission statuses, scheduling details, and recorded visit data for completed visits that will be exported to third-party aggregators; this report can be used to view status information for visits that have been submitted to third-party aggregator.

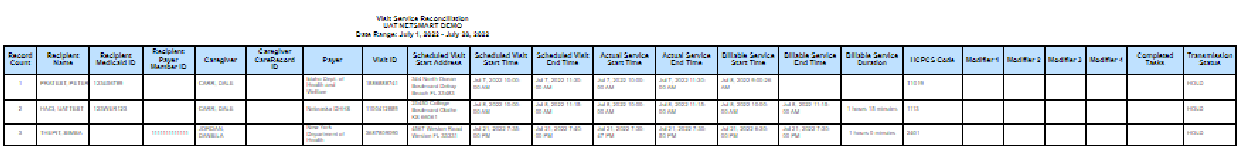
By default, the **Visit Reconciliation Report** displays rendered service records for visits completed in the current day by transmission status.

***Warning**: The Visit Reconciliation Report is intended for providers that have Stand Alone subscriptions to the Mobile Caregiver+ Provider Portal, where providers use the Mobile Caregiver+ Provider Portal to schedule and complete EVV visits to be exported to a third-party aggregator.*

The report will the display following data for each Completed visit: Recipient Name, Recipient Medicaid ID, Recipient Payer Member ID, Caregiver, Caregiver CareRecords ID, Payer, Visit ID, Scheduled Visit Start Address, Scheduled Visit Start Time, Scheduled Visit End Time, Billable Service Duration, HCPCS Code, Modifier 1, Modifier 2, Modifier 3, Modifier 4, Completed Tasks, Transmission Status.

Providers can customize the default report using the controls on the left to select the following parameters:

- Payer.
- The Start Date and End Date for Completed visits.
- Transmission Status.


Visit Service Reconciliation
UAT NETSMART DEMO
Date Range: July 1, 2022 - July 31, 2022

Record Count	Recipient Name	Recipient Medicaid ID	Recipient Payer Member ID	Caregiver	Caregiver CareRecord ID	Payer	Visit ID	Scheduled Visit Start Address	Scheduled Visit Start Time	Scheduled Visit End Time	Actual Service Start Time	Actual Service End Time	Billable Service Start Time	Billable Service End Time	Billable Service Duration	HCPCS Code	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Completed Tasks	Transmission Status
1	PROTEST, PETER	123456789		CARR, DALE		Idaho Dept. of Health and Welfare	[illegible]	[illegible]	Jul 7, 2022 10:00:00 AM	Jul 7, 2022 11:30:00 AM	Jul 7, 2022 10:00:00 AM	Jul 7, 2022 11:30:00 AM	Jul 8, 2022 9:00:26 AM			T1019						HOLD
2	HACI, UATTEST	[illegible]		CARR, DALE		Nebraska DHHS	[illegible]	[illegible]	Jul 8, 2022 10:00:00 AM	Jul 8, 2022 11:15:00 AM	Jul 8, 2022 10:00:00 AM	Jul 8, 2022 11:15:00 AM	Jul 8, 2022 10:00:00 AM	Jul 8, 2022 11:15:00 AM	1 hours, 15 minutes	[illegible]						HOLD
3	[illegible]		111111111111	JORDAN, DANIELA		New York Department of Health	[illegible]	[illegible]	Jul 21, 2022 7:30:00 PM	Jul 21, 2022 7:00:00 PM	Jul 21, 2022 7:30:47 PM	Jul 21, 2022 7:30:00 PM	Jul 21, 2022 6:30:00 PM	Jul 21, 2022 7:30:00 PM	1 hours, 0 minutes	[illegible]						HOLD

Related Topic

[Generating a Report](#) [Exporting a Report](#)